

## **MILLENNIA LITE ORDERING GUIDELINES**

# Millennia Lite Ordering Guidelines

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# **Millennia Lite Ordering Guidelines**

## **CHAPTER 1**

### **Introduction**

MILLENNIA LITE is a multiple award contract vehicle designed to provide the full range of Information Technology (IT) support services. Through the use of MILLENNIA LITE, clients have a flexible means of meeting IT needs quickly, efficiently, and cost effectively. MILLENNIA LITE was designed to provide clients with highly skilled, responsible contractors (large, small, small women-owned, small disadvantaged and HubZone) who possess a wide variety of expertise.

Overall responsibility for the MILLENNIA LITE contracts rests with the Information Technology Acquisition Center, Federal Technology Service of the General Services Administration.

### **Purpose of this document**

This document describes the procedures for ordering the contract services of MILLENNIA LITE and defines roles and responsibilities of major parties involved therein and was designed to give all parties associated with MILLENNIA LITE a better understanding of the MILLENNIA LITE contracts. The fundamental intent of this document is to provide ordering information about MILLENNIA LITE. **(NOTE:** This document is intended for guidance only. In the event that any statement in this document conflicts with the terms and conditions of the MILLENNIA LITE contracts, the terms and conditions of the contracts take precedence.)

### **Background - FASA**

The Federal Acquisition Streamlining Act (FASA) authorizes the use of multiple award contracts. These contracts allow the Government to acquire an indefinite quantity, within stated limits, of supplies or services during a fixed period, with deliveries or performance to be scheduled by placing orders with the contractor. Thanks to the clarification provided in FASA, agencies can now use these contracts with greater confidence and, at the same time, realize the benefits of an ongoing competitive environment throughout the duration of the contract while minimizing the delays for conducting a separate procurement for each requirement.

In order for agencies to take continuous advantage of the benefits of competition after contract award, FASA provides that agencies may make multiple awards of task and delivery order contracts for the same or similar supplies or services (and from the same solicitation) to two or more sources. The use of multiple award contracts allows agencies to take continuous advantage of the competitive forces of the commercial marketplace which will result in lower prices, better quality, reduced time from requirements identification to award, and improved contractor performance in satisfying customer requirements. By offering market competition on price and technology for each order, multiple award contracting provides contracting officers (COs) with the flexibility needed to better match the dynamics of the IT market.

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Since MILLENNIA LITE is a multiple award vehicle, using MILLENNIA LITE can serve to reduce the overhead associated with multiple acquisitions. In addition, aggregation of demand provides the Government with buying leverage and encourages vendors to offer the best possible prices due to economies of scale. This factor is especially effective for maintaining better prices and quality.

FASA has established a "general" preference for use of multiple awards and in doing so:

- authorizes deletion of the public notice requirement when placing orders,
- limits protests in connection with the issuance of orders except on the grounds that the order increases the scope, period, or maximum value of the contract, and
- mandates that multiple awardees have a fair opportunity to be considered for orders in excess of \$2,500.

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### **Overview**

Orders from MILLENNIA LITE can be placed by GSA for use on its own behalf or on the behalf of client agencies. MILLENNIA LITE also provides for direct order/direct bill by other agencies who have been given a Delegation of Authority by the MILLENNIA LITE Procuring Contracting Officer (PCO). In either case the first order of business is to establish the lines of communication, and a definition of responsibilities and commitments, for all parties. This is done via a Memorandum of Understanding (MOU). The MOU defines the client's responsibilities and commitments when services are obtained from GSA and applies to all orders issued for the client. An MOU will be signed by GSA and the client prior to the issuance of an order. (See Appendix D.)

The responsibilities of GSA and client agencies when GSA delegates contracting authority to another agency for order placement are not to be taken lightly. In fact, ongoing interface and oversight on the part of the MILLENNIA LITE ACO (Administrative Contracting Officer) is of paramount importance and integral to the successful and appropriate use of the MILLENNIA LITE vehicle.

This document provides information on the key phases of ordering from MILLENNIA LITE. Streamlined ordering techniques, such as the use of oral presentations and the use of past performance as an evaluation factor, are discussed herein. The document also provides information on the "fair opportunity to be considered" requirement. It highlights the flexibility agencies have in developing the criteria that provide awardees a fair opportunity to be considered for orders under multiple award contracts. Also, it includes a discussion on the exceptions to fair opportunity.

All tasks performed under MILLENNIA LITE are initiated through the award of task orders by an ACO to a MILLENNIA LITE contractor. The following procedures are intended to be a guide through the decision making process to the successful award of a task order which ultimately gets the work accomplished on time and fully satisfies the technical requirements under consideration. Procedural steps are presented as a general description of events as they should occur. Agencies, other than GSA, who have Delegations of Authority to use MILLENNIA LITE, may use unique forms or employ additional procedures to facilitate management requirements.

A preliminary step before beginning a MILLENNIA LITE project is to define the problem and identify the need for a solution. All facets of the project from identifying the requirements and developing the Statement of Work (SOW) through selection of a contractor and awarding the task order to accepting deliverables and managing the task closing will be performed.

The services of a GSA team experienced in managing all of the details of MILLENNIA LITE are available to place orders and provide oversight for MILLENNIA LITE projects (see Appendix B for GSA Points of Contact). GSA is available to assist clients through every step of the process.

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### MILLENNIA LITE's View to Best Practices

The ordering guidelines contained herein are in concert with the Best Practices guidance of the Office of Federal Procurement Policy, Office of Management and Budget and bring particular focus to the following elements:

- MILLENNIA LITE continuously seeks contractor input to improve the efficiency and effectiveness of the ordering process.
- MILLENNIA LITE has a reasonable number of awards (10-12) within each of the four (4) functional areas, which ensures competition but keeps the ordering process from being overly burdensome.
- MILLENNIA LITE orders are processed via the IT-Solutions Shop<sup>1</sup>, an automated system, to manage task order issuance and make the overall ordering process more efficient by:
  - Maintaining a short RFP development and award cycle – 14 days on average;
  - Increasing communication between industry and government; and
  - Increasing understanding of the requirements through a dynamic interactive approach.
- MILLENNIA LITE advocates simplified procedures and award documentation when issuing orders.
- MILLENNIA LITE promotes the use of performance-based work statements.
- MILLENNIA LITE provides for the consideration, advance planning, and use of oral presentations to reduce lead time and contractors' proposal preparation costs.
- MILLENNIA LITE encourages the use of page limitations on proposal size in those cases where written technical proposals are required.
- MILLENNIA LITE provides for documents such as this to provide ongoing guidance in the use of the contracts.
- MILLENNIA LITE provides for extended communication between the contracting office and program/technical offices via its Call Center. This is especially useful in addressing questions concerning determinations of fair opportunity for consideration.

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<sup>1</sup> The IT Solutions Shop is an e-commerce system for on-line interactive, web-based ordering. Users are able to submit, process, monitor and award orders in a secure real-time work environment.

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- MILLENNIA LITE utilizes the services of the Information Technology Acquisition Center to ensure technical/program personnel involved in the fair opportunity process are well apprised of the appropriate use of multiple award task and delivery order contracting.
- MILLENNIA LITE has established regular communication with awardees via the Information Technology Acquisition Center (ITAC). Additionally, quarterly meetings with awardees in each Functional Area take place to discuss administrative matters, future requirements, and needed improvements in the ordering process.

The following chapters of this document list and describe the steps and procedures to be followed to award a task order to a MILLENNIA LITE contractor. (See Appendix K for Process Flow Charts.)

Please note that the procedural guidance contained herein is **not intended to supersede the terms and conditions of the MILLENNIA LITE contracts,**

Questions or comments concerning specifics of this document can be addressed by contacting the **MILLENNIA LITE Call Center** (shan.clark@gsa.gov or (817) 978-3506).



### CHAPTER 2

#### Ordering Procedures

##### Requirements Analysis

The first step in ordering from MILLENNIA LITE is to determine the requirements. A requirements analysis establishes the agency's need for support services. It includes the early stages of determining information needs based on the agency's mission and activities, identifying support services to achieve long-term objectives and short-term needs, and considering budgeting needs for the support services. The requirements analysis will also identify the duration for which the services will be provided, the minimum qualifications for the service provider, whether the service providers will be on-site or off-site, etc. The agency should identify requirements in the following areas:

- A. Scope – The agency should identify the coverage of the support services in terms of the organizations, programs, and systems they will support. Occasionally the services will cover the entire agency and all its systems, but that is rare. It is more likely that they will support only part of it, and the agency should identify that part. The part could be an organization, geographic location, program, and/or system.
- B. Constraints – The agency should identify all constraints that would impact the services. For example, the agency might limit an analysis of alternative software architectures for a new system to those that run on the agency's existing mainframe computers. Acquisition support services might be constrained to a compatibility-limited requirement.
- C. Deliverable Items – The agency should specify what the contractor is to deliver. For most support services, this will generally be written deliverables. For these, the agency should describe: Purpose and objective; Topics to be covered; Target length, if appropriate; Format (e.g., written report, memorandum, briefing package); Number of copies; Media (e.g., paper copy, electronic copy, including electronic format standards (e.g., in word processing package XYZ, in ASCII)); and Delivery dates.

Not all deliverables will be on paper. Clerical support services (e.g., source data entry) will generally yield data in electronic format. For these, the agency needs to specify format (e.g., records readable by a particular database management system or for use on a particular brand of computer) and media (e.g., diskette, tape).

Training may include both written deliverables (e.g., workbooks) and services delivered (e.g., classroom instruction). Technical support services will consist primarily of contractor staff delivering services in person (e.g., controlling a central processing unit (CPU)).

For services delivered in person, the agency should describe in detail what activities the contractor staff must perform. However, as required by Office of Federal

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Procurement Policy (OFPP) Policy Letter 91-2, focus the description on “what” the contractor must produce, not “how” to do it. In other words, describe the desired output, not step-by-step procedures for producing it.

- D. Applicable Standards – The agency should identify Government wide, agency, or industry standards the contractor should follow. The most extensive set of Government wide standards is the FIPS PUBS developed by the National Institute of Standards and Technology (NIST). FIPS PUBS include both document standards (e.g., FIPS PUBS 38 and 64) and technical standards for hardware, software, and telecommunications (e.g., FIPS PUB 146 for the Government Open Systems Interconnection Profile (GOSIP)). Applicable FIPS PUBS for technical standards, such as 146, must be cited in the SOW. FIPS PUBS for other documentation standards are cited at the agency’s discretion.

The agency may also have its own standards for particular activities. For example, the agency’s system development methodology may provide outlines for written deliverables such as analytical studies. It may also dictate procedures for custom system development. The agency may also have its own writing and document format standards. In addition, agencies typically have their own security standards for protecting classified, sensitive, or privacy information.

Finally, the agency may require compliance with industry standards published by the American National Standards Institute (ANSI), Institute of Electrical and Electronics Engineering (IEEE), International Standards Organization (ISO), or other organizations.

- E. Performance-Based - As described in Chapter 3, OFPP Policy Letter 91-2 requires that agencies use performance-based contracting methods for services wherever possible. (See Appendix J) Therefore, identifying detailed requirements for support services focuses on developing performance measures for evaluating the contractor’s work. The specific measures will vary according to the service, but might include: Compliance with standards; Consistency with the contract’s statement of work; Consistency with deliverables already approved by the agency; Reliability of physical products (e.g., benchmark software); Error rates (e.g., for source data entry services); Time-related factors, such as – delivery according to the schedule in the contract, System availability (e.g., for facilities management services), and Rate at which records are entered per day (e.g., for source data entry services); and Quality and value, as determined by the agency. **If performance standards are not available, the agency is encouraged to include in the Statement of Work a requirement for the contractor to provide a Performance Matrix as a deliverable to assist in the development of performance standards for future task orders.**

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- F. Government vs. Contractor Responsibilities – Because of cost, control, or security, the agency may not want the contractor to provide all aspects of the support services. As part of its requirements analysis for the services, the agency should identify what it will provide in the following areas:

Facilities – Space for contractor staff to work. The staff might visit the agency's facility only infrequently and require only access to a telephone, or staff might be located on-site full-time for the duration of the contract.

The Government may need to have the contractor staff on-site because of the nature of the work (e.g., a facilities management contract for computer center operation) or for reasons of security, control, convenience, or coordination with agency staff conducting similar activities.

Contractors typically offer lower prices for on-site arrangements, although the Government must consider its cost for providing space and supplies when calculating the total cost over the life of the contract.

Equipment – The agency may provide equipment for contractor use in performing the work. For on-site contractor staff, the agency might provide telephones, photocopying equipment, and/or office automation equipment and software. For source data entry contracts, the agency might provide terminals and telecommunications equipment. For a facilities management contract, the agency will typically provide all equipment in the computer center.

For off-site work, many vendors already have standard office automation capabilities in place for conducting their day-to-day business. The Government, therefore, will not have to provide this type of equipment. Government-furnished equipment for off-site work would be limited to specialized or unique equipment.

In deciding whether to supply equipment, the agency should weigh cost, resource, and schedule implications of acquiring the equipment itself vs. having the contractor acquire it and, typically, bill the Government.

The agency should keep careful inventory records of equipment provided to a contractor and ensure its return at the close of the contract. Any equipment that the contractor acquires at the Government's direction and is paid for through the contract should be turned over to the agency at the end of the contract.

- G. Information – Agencies will almost always provide information to contractors to help them develop their proposals and to conduct the work after contract award. Information provided before award is typically either included as an attachment or in a library vendors may visit.

As part of the requirements analysis, the agency should identify the information that contractors might need, assemble materials already written, and develop any

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necessary new materials. Information provided will vary with the support services, but might include organization charts, mission statements, agency standards, descriptions of existing systems, recommended layouts for data entry screens and reports, manual and automated procedures, and relevant deliverables from past contractors.

- H. Staffing – Finally, the agency should decide whether it wants contractor staff to perform all activities for the support services or whether agency staff will perform some of them. For example, to run a large data center, the agency may decide to issue a facilities management contract for operating the tape and disk libraries, but retain such functions as job control, configuration management, and user assistance.

Using both agency and contractor staff to support the same function makes it more difficult to hold the contractor accountable for quality and performance and provides opportunities for denial of responsibility (i.e., finger pointing). Facilities management support of a computer center is one example of this situation. Overlapping responsibilities could lead to claims from either the agency or contractor's employees that the other organization did not properly maintain the hardware. Also, configuration changes made by one group may not be communicated to the other, possibly leading or contributing to system failures. A clear line of responsibility (e.g., which entity is responsible for which activities) is essential to the proper functioning of the computer center.

### **Functional Areas**

The Government, at its discretion, will determine under which functional area a task order request belongs. This determination will be based on the predominant work to be performed under the task order (e.g., 70% = Functional Area 1, and 30% = Functional Area 2 will be categorized as Functional Area 1). Millennia Lite offers five different functional areas of support and services as listed below:

#### **Functional Area 1 – Information Technology Planning, Studies, and Assessment.**

Functional Area 1 encompasses Information Technology Planning, Studies, and Assessment to assist the Chief Information Officer and the IRM Official to implement the Clinger-Cohen Act. The scope of this functional area includes both information technology capital planning and assessment. IT assessment includes business case analysis (cost/benefit and risk), performance measurements, independent validation and verification of systems development projects as well as measuring IT progress, return on investment, earned value, and compliance with federal interoperability standards and enterprise architectures as intended by the Clinger-Cohen Act. This functional area includes studies and analyses designed to further enhance agency compliance with, but not limited to, OMB Circulars A-76 and A-130.

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### Functional Area 2 – High-End Information Technology Services (HITS).

HITS will provide client agencies a variety of systems support including embedded systems support for complex, high-end information technology engineering life cycle services. This includes, but is not limited to: Systems engineering and integration; scientific and engineering applications development; and database application development for embedded systems.

HITS requirements are primarily associated with the following disciplines, government mission areas, and associated applications (including technology transfer):

Acoustic	Aerospace	Aeronautical	Astronautical
Biological	Biomedical	Chemical	Civil
Electrical	Environmental	Geological	Geotechnical
Industrial	Logistics	Maintainability	Maintenance
Marine/Naval	Materiel	Mechanical	Nuclear
Optical	Petroleum	Reliability	Quality Assurance
Quality Control	Safety	Software	Systems
Systems Missions Analysis		Water/Waste	
Health Care/Health Care Management			

HITS projects may encompass studies, analyses, design, development, configuration, integration, documentation, acquisition, modification, installation, testing, training, operation, and/or maintenance of stand alone and/or embedded hardware and software in a simulation, experimental, laboratory, military, and business/operational setting.

The anticipated services require a diversity of knowledge, skills, and experience with a variety of IT engineering tools and environments, and a broad spectrum of scientific and engineering disciplines. Anticipated tasks include but are not limited to the following:

- Computer Aided Design (CAD)
- Computer Aided Engineering (CAE)
- Computer Aided Management (CAM)
- Independent Validation and Verification (IV&V)
- Design/Specifications
- Documentation and Information Dissemination
- Economic/Business case analysis
- Economic impact evaluations
- Education/training
- Environmental control
- Instrumentation
- Reliability and Maintainability
- Reverse engineering
- Simulation and modeling
- Source data development (forward engineering hardware and software systems)
- Source data validation (existing hardware and software systems)
- Statistical analysis

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Excluded are engineering and technical services related to Architecture and Engineering governed by FAR Part 36, foundations and landscaping, heating, ventilation and air conditioning.

### **Functional Area 3 – Mission Support Services (MSS).**

The services offered under this area include a broad range of IT related to Mission Support Services (MSS). The anticipated services require a diversity of skills suitable to a variety of information technology environments. The ability to respond and to perform assignments with high quality services within a stringent time frame is essential. All task orders will require that the Contractor provide an integral staff including supervision. Anticipated services include, but are not limited to, the following areas of support:

- System Development and Software Maintenance
- Facilities Planning, Management, and Operations
- Local Area Networks (LAN), Metropolitan Area Networks (MAN), and Wide Area Network (WAN) System Design, Management, and Support
- Computer Systems Administration, Management and Maintenance
- Data Entry, Data Storage, Data Retrieval, and Electronic Records Management
- Specialized Workstation (i. e. CAD, CAD/CV, GIS) Support
- Computer Equipment Maintenance (both on-going and on-call)
- Systems Installation and Integration
- Production Support
- Software and Application Development, Maintenance and Enhancement Support
- Data Base Generation and Data Base Management
- Data and/or Media Management
- Orientation and Training
- Information Center/Help Desk
- Computer Graphics Support Services Electronic Records Management

### **Functional Area 4 - Legacy Systems Migration and New Enterprise Systems Development.**

The services offered under this area include project management of legacy systems migration and enterprise systems development that government CIOs/IRMs consider important. The services required are to support (but not limited to) the following enabling and critical technologies:

- Modernization of legacy systems to web enabled applications
- Software development, customization of COTS software packages, and migration to modular applications
- Internet/Intranet/Web Applications/Network Computing
- Information and System Security/Firewalls/Critical Infrastructures
- Knowledge Management
- Data Warehousing
- Electronic Commerce/Electronic Data Exchange

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Year 2000 Remediation and Test Tools  
Groupware  
Next Generation Internet  
Client/Server Computing  
Workflow and Imaging

### Functional Area 5 - Future Technologies

The services and solutions offered under this functional area represent a delayed requirement to meet out clients' needs for evolving technologies in support of the Federal Technology Service's future business lines.

#### Contract Type

Millennia Lite allows agencies to negotiate different types of contracts with vendors which differ in the degree of risk assumed by the contractor for the costs of performance and in the profit incentives offered. The contract types are grouped into two broad categories: fixed-price and cost-reimbursement. Generally, the contractor assumes the most risk (of losing money) in fixed-price contracts and the least risk in cost-reimbursement contracts. Conversely, the Government assumes more risk (of paying more than it expected) in cost-reimbursement contracts and less risk in fixed-price contracts.

Depending on an agency's requirements, some services are more appropriate for fixed-price contracts and others for cost-reimbursement contracts. When requirements are well-defined, allowing contractors to estimate their costs with a reasonable degree of accuracy, fixed-price contracts are almost always in the Government's best interest. The following are the four contract types offer under Millennia Lite:

**A. Firm Fixed-Price Contracts (FFP)** – The most common type of fixed-price contract is firm-fixed-price in which the contractor agrees to furnish specific quantities of specific services at a specific price. The FFP is not adjustable no matter what it costs the contractor to perform the work unless a bilateral agreement exists between contractor and CO. While this carries the greatest degree of financial risk for the contractor, it also offers the greatest potential for profit. Thus, the FFP contract encourages efficiency.

Fixed-price contracts are most appropriate for services for which the requirements are unambiguous and known in detail, costs can be predicted with an acceptable degree of certainty, and adequate price competition exists in the marketplace (e.g., source data entry for a specified quantity of work, training for an off-the-shelf word processing package).

**B. Cost-Plus-Fixed-Fee (CPFF)** - is the most common type of cost-reimbursement contracts. For this, the offeror first estimates the total cost of performing the work. The dollar amount of the fixed fee is then calculated, usually by applying an assumed profit margin to the cost estimate. The fee is negotiated and the dollar

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amount fixed at contract award.

As the contractor performs the work, the Government reimburses it for allowable costs as provided in the contract. Some expenses (e.g., travel) are not reimbursable at all. Agency and outside auditors, such as the Defense Contract Audit Agency (DCAA), can be used to monitor the contractor's costs.

If, at the end of the work, the contractor's costs are below those estimated at contract award, the dollar amount of the fixed fee compared to the costs represents, in effect, a higher profit margin. On the other hand, if the actual costs exceed the original estimate, the dollar amount of the fixed fee represents a lower profit margin. Thus, fixing the dollar amount of the fee encourages the contractor to perform at or below the original cost estimate.

CPFF contracts have two forms: completion and term. Under the completion form, the contractor is obligated to complete the work. Under the term form the contractor is obligated only to provide a specified level of effort during a specified time. The completion form is preferred over the term form because the contractor has a greater obligation to deliver a usable product.

CPFF are most suited to situations in which the Government's requirements cannot be stated in detail or in which the agency wants flexibility to modify its requirements. For example, independent verification and validation (IV&V) services generally meet these criteria since the level of effort required of the IV&V contractor depends in part on the performance of the contractor developing the system to be verified.

However, if an agency changes its requirements (though staying within the scope of the contract), the contractor's costs may increase. If a contract modification is required to accommodate the new requirements, the contractor may petition the CO for a corresponding increase in its fee.

### **C. Time-and-Materials Contracts (T&M) –** Provide for direct labor at fixed hourly rates (including contractor overhead, administrative loading and a profit margin) and materials (including both non-labor components and expenses) at cost.

A T&M contract may be used when it is not possible to predict accurately the number of labor hours required. However, because a profit margin is built into every hour worked, the contractor has little incentive to perform efficiently under a T&M contract. Therefore, the contract should establish ceilings for the total dollar amount the contractor can bill the Government. Some T&M contracts also establish ceilings on the number of labor hours.

Time-and-materials contracts provide little incentive for cost control or labor efficiency. FAR Part 16 states that this type of contract may only be used after the contracting officer executes a determination and findings stating that no other contract type is suitable and that the contract contains a ceiling price that the contractor exceeds at its own risk



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- D. Cost-Plus-Award-Fee (CPAF)** – Except for T&M, each of the contract types discussed above can encourage the contractor to control costs (i.e., in firm-fixed-price contracts, the contractor will lose money if its costs exceed the price and in cost-reimbursement contracts, the contractor's profit margin will be reduced if costs exceed the original estimate). Agencies may also find it worthwhile to incorporate award fee provisions, which reward high quality and/or fast delivery, into the contract.

Award fees are based on subjective factors, such as quality or technical ingenuity. Award fee contracts required full documentation in the contract of the factors considered in determining the fee. This protects the agency from contractor claim that the fee was too low and charges by Government oversight agencies that the fee was too high.

Awards must be structured to encourage the behavior the agency intends. Also, to be motivated by an award fee, the contractor must understand the fee determination process and perceive it as fair.

Award fee contract is more difficult to administer because they require the CO to maintain substantiating documentation.

With CPAF, the Government pays allowable costs, based fee, and award fee. The contractor earns a base fee that does not vary with performance and, in addition, earns all or part of an award fee based on the Government's unilateral evaluation of the contractor's performance in terms of the criteria stated in the contract.

The CO (with input from program and technical staff) determines the amount of the award fee. The contractor's performance is evaluated at stated intervals and corresponding partial payments of the fee are made. **(Note: GSAM 516.406 states that the Contracting Director (or equivalent) must approve all award fees prior to issuance.)**

Note: Both CPFF and CPAF above require that the fee shall not exceed the applicable, FAR-cited statutory percentage limitation of the estimated cost, excluding fee (see FAR 15.903(d)(1)). Per FAR 15.903(d)(2), a deviation to this limitation may be authorized in the case of cost plus award fee contracts in accordance with FAR Subpart 1.4.

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### **Statement of Work (SOW) (See Appendices E & J for Templates)**

For those orders issued by GSA, and for the GSA representative to effectively meet the needs of the customer, a mutual understanding with the client regarding a given requirement needs to be established as stated above. For this to occur, the GSA representative and the client will work together to develop the SOW. The SOW is a required document. See Appendices E & J for examples of content, and format.

The SOW for task orders must clearly define the requirements to be procured so the offerors can develop meaningful proposals that meet the Government's requirements. COs should apprise customers and program officials that the intent of FASA is for awardees under multiple award contracts to compete for well-defined tasks, not for undefined tasks that are later defined by sole source work orders issued to the selected awardee. Agencies shall not award large, undefined task orders in an effort to expedite the award only to issue subsequent sole source work orders or broadly interpreted technical direction letters.

The SOW should provide the offeror with answers to five basic questions: what, when, how many or how much, and how well. It is important for the SOW to accurately answer these questions in order to allow the offeror the opportunity to accurately assess resources required and risks involved.

In addition to those areas you must consider above you also need to consider the following:

#### **A. - Oral Presentations**

You must decide and address in the SOW whether you want the offeror to provide oral or written proposals or a combination of both. In certain situations, oral presentations may be the preferred method of obtaining contractor proposals. Many agencies now use oral presentations as a substitute for a portion or all of the traditional written proposal in competitively negotiated procurements.

The concept of oral presentations is being considered throughout the Government as a means of streamlining the proposal evaluation and source selection processes. Variations in approach include: Media used to record the presentation; restrictions on the extent and nature of material used in the presentation; the Government participants; the offeror's presentation team; and the amount of time permitted for the presentation. Since there is no single best approach for using oral presentations, procurement officials are afforded significant latitude relative to the construct and architecture of the oral presentation scenario.

Based on an examination of procurement statutes and regulations, and General Accounting Office (GAO) and court cases, there are no legal impediments to the use of oral presentations. All of the safeguards and standards embodied in the Federal procurement process, e.g., fairness, impartiality, formality, etc., need to be observed. There is nothing that suggests that the use of oral presentations would impair the

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selection decision, or that a binding contract would fail to come into existence, or that there would be a basis for successful protest based merely on the use of the oral presentation approach. FAR 15.102 discusses oral presentations. Further support can be found in the current literature, which endorses the concept of oral presentations. (See Appendix L).

### **B. - Evaluation Criteria**

You must also decide and address in the SOW what evaluation criteria you plan on using to evaluate proposals. Several methods for the evaluation of proposals exist. However, each has its strengths and weaknesses. Agencies must choose the most suitable method according to each unique situation. (See Appendix F for sample evaluation criteria) Evaluation criteria are those factors deemed by the Government to be the most important factors in consideration of task award. Establishing sound evaluation criteria works to the advantage of all parties involved in the competitive process in as much as: The client is able to enunciate those elements that are most integral to the performance of the technical requirement; and the offeror is better able to make a sound business decision to bid or not bid on the technical requirement. The offeror is further afforded the advantage of knowing what to address in his proposal.

Based on your analysis above, you would either use Technically Acceptable/Lowest Bid or Best Value approach.

The technically acceptable/lowest price approach is appropriate when award is expected to result from the selection of the technically acceptable proposal with the lowest evaluated price. The SOW shall set forth the evaluation factors and significant subfactors that establish the requirements of acceptability. Further, the SOW shall specify that award will be made on the basis of the lowest evaluated price of proposals meeting or exceeding the acceptability standards for the non-price factors. Unlike this traditional method, best value considers cost as just one of several factors necessary to make a decision. COs select the most advantageous offer by evaluating and comparing factors in addition to cost or price. Best value is a more expensive and time consuming process and you have to lay that against your expected returns.

The request for proposal process generates creative competition, requiring bidders to exercise their innovative genius. Instead of confining the selection process to the lowest bidder, best value opens the operation to inventive solutions and comprehensive evaluations.

Below are examples of when the best value approach would be used:

When the agency has defined a need and requests the offerors propose the best method for accomplishing it.

When the agency will consider factors other than lowest price when determining whether or not to make an award.

When the skills, expertise, or technical capability of the bidders will be evaluated.

## Millennia Lite Ordering Guidelines

When the problem or need is fairly detailed or complex.

When the specifications of the project cannot be clearly defined.

Here the focus shifts from price to goals and requirements. The agency must identify factors relevant to the selection of a contractor, then prioritize or weigh those factors according to their importance.

After determining expectations, the agency must establish evaluation criteria. The CO will use these factors to decide which of the proposals submitted would best meet the agency's needs.

The CO sets basic requirements, also known as mandatory criteria. Any bid unable to satisfy any of these requirements is deemed incapable of performing the contract and is rejected.

You really have to be cautious because mandatory criteria need to be a make-it-or-break-it type of standard. The question you should ask yourself is "Should you reject an otherwise attractive proposal based on not meeting this one criterion?" Be prepared to set an entire proposal aside based on this one factor not being met.

Weighted criteria consist of desired factors, but not "must have." Commonly used criteria include qualifications, relevant experience, quality of work, references, service, human resources, cost, facilities, technical capabilities, and proposed time lines. An agency assigns a priority or weight to each factor according to its importance.

For the evaluation to be effective the criteria should have the following characteristics:

Objective: criteria should not be subject to diverging interpretation.

All-encompassing: criteria should address all key elements of the contract.

Discriminatory: criteria should separate best, average, and weaker proposals.

Non-Discriminatory: criteria should be fair and reasonable.

Realistic: criteria should be within reason, given the contract nature and/or value.

Measurable: criteria should have measurable standards.

Economical: criteria should not consume an unreasonable amount of time or resources.

## Millennia Lite Ordering Guidelines

### C. - Method of Award

The SOW must inform offerors with information about the methodology the Government will use in evaluating proposals. (See Appendix O for Sample “Method of Award Language”)

### Independent Government Estimate (IGE)

All major elements of the MILLENNIA LITE contract were negotiated prior to award, with a contract level IGE serving as the negotiation objective for the rates associated with skill levels. Although the FAR does not require IGEs, there will be cases when the Government finds that development of an IGE for a task will enhance the Government's position during negotiation. In view of this, while the development of an IGE is optional, it is nonetheless, advisable. It is incumbent upon the Government, therefore, to make a determination whether or not an IGE is required for the development or modifications of a given task order. The ultimate determination will be based on the complexity of the task and other factors as delineated below.

**When the IGE may not be necessary.** Examples of when an IGE may not be necessary include:

- a. When the task is a follow-on task with an historical basis for evaluating the contractor's proposal
- b. When the task is virtually identical to another currently operational task
- c. When the task is sufficiently simple and straight forward
- d. When the staffing guidelines are clearly applicable to the task requirements
- e. When task modifications reflect
  - contractor initiated change orders
  - extensions to the period of performance
  - changes to travel requirements
  - changes to training
  - changes to overtime
  - changes to equipment or other materials.

**When an IGE may be required.** Examples of when an IGE is recommended include:

- a. When the task is Firm Fixed Price
- b. When a number of staffing methods apply and each deserves due consideration
- c. When there is no similar or predecessor task from which to draw information
- d. When the staffing guidelines of the contract contain a degree of ambiguity with respect to the specific set of task requirements.

## Millennia Lite Ordering Guidelines

When an IGE is deemed necessary, it will be prepared by the Government and will address the resources required to accomplish the requirements of the task and a narrative in support of the hours and skill levels estimated. Since the main purpose of the IGE is to provide a tool to evaluate the contractor's proposal to determine whether the price is fair and reasonable and the contents show a thorough understanding of the task to be accomplished, the IGE will be prepared prior to, and independent of, the contractor's proposal.

In terms of analysis, the IGE will be based upon the skill levels and functional elements defined in Section C of the MILLENNIA LITE contract. The IGE will also address Other Direct Costs as applicable, which may include costs associated with travel, hardware in support of the task requirements, etc.

### Request for Proposal (RFP)

Each awardee under MILLENNIA LITE will be given a fair opportunity for each order in excess of \$2,500, unless an exception applies (See Appendix I). The FAR states that, in determining the procedures for providing awardees a fair opportunity to be considered, COs should use good business judgment to determine appropriate methods for considering factors such as past performance, quality of deliverables, cost control, price/cost, or other factors that are relevant to the placement of orders. Detailed descriptions of fair consideration alternatives are described in Appendix I to this document. Appendix H provides sample letters that can be used to assist contractors in making a strategic business decision of whether to bid on a requirement.

There are two methodologies for Placement of task orders. Methodology I - Oral presentation of Technical Proposal and Methodology II - Written Technical Proposal. The two methodologies have several common steps. The steps for each methodology are indicated below:

- **Step 1 (Applies to both methodologies)** - The Government will provide to each Contractor a task request via GSA's electronic system which will be used to specify the work to be accomplished by the Contractor to satisfy a particular task requirement. As a minimum, each task request will include:
  - (1) A description of the work to be performed;
  - (2) The desired delivery schedule and/or required completion date(s), as applicable;
  - (3) Additional acceptance criteria, if any;
  - (4) Reporting requirements and list of deliverables;
  - (5) The date and time by which their response is due;
  - (6) Travel and supply requirements, if any;
  - (7) Desired type of pricing, i.e., FFP, CPFF, CPAF, T&M;
  - (8) Instructions, conditions, and notices to offerors; and;
  - (9) Evaluation factors (After initial orders are performed, past performance under this Contract will always be an evaluation factor)

## Millennia Lite Ordering Guidelines

- **Step 2 (Applies to both methodologies)** - The Contractor shall, within the time frame specified in each task request, provide the ACO with a statement indicating intent to propose or reasons for not proposing for the specific requirements.
- **Step 3 (Applies to both methodologies)** - The Contractor shall, within the timeframe specified in each task request, provide the ACO with any questions regarding the requirement.
- **Step 4 (Applies to both methodologies)** - The ACO shall, within the timeframe specified in each task request, provide all participating Contractors with questions asked and answered regarding the requirements.
- **Step 5 (Applies to Methodology I only)** - In lieu of a written technical proposal, the Contractor shall demonstrate their technical proposal through an oral presentation. In the timeframe specified in each task request, each participating Contractor will be afforded the opportunity to make an oral presentation, not to exceed the time frame specified by the ACO, of capabilities to perform the requirement. To maintain fairness without an adverse impact on the award schedule, presentation times shall be randomly provided to the participating Contractors by the ACO at the same time previous step is completed. After the oral presentation, the Government will reserve a set amount of time to be determined by the ACO to address clarifications regarding the presentation.
- **Step 6 (Applies to Methodology II only)** - The Contractor shall, within the timeframe specified in each task request, provide the ACO with a written proposal via GSA electronic system.

**Step 7 (Applies to both methodologies)** - The Government anticipates award based upon initial offers. Should all initial proposals contain deficiencies which would preclude award based upon initial offers, the ACO will enter into oral and/or written discussions to resolve deficiencies. In the event discussions are necessary, each Offeror will be notified and provided an opportunity to submit a Final Proposal Revision. Upon receipt of a Final Proposal Revision, the ACO will complete evaluation and award the task order through GSA's electronic system (if GSA) or other means (if outside GSA).

## Evaluation of Proposals

The goal of the proposal evaluation is to ensure that each proposal addresses all of the required elements of the SOW and, that the source selection is impartial, equitable and comprehensive. The Government may evaluate the technical proposals using either one Government representative or a team of representatives. For example, a Project Manager or an Information Technology Manager for GSA may be the sole technical evaluator for the Government, or the client agency may offer a number of representatives to assist in the technical evaluation. There is considerable latitude given in constructing the approach to evaluation. Please note, however, the number of evaluators should be kept to the minimum number necessary to effectively perform the evaluation.

When using the technically acceptable/lowest price approach, proposals are evaluated for acceptability but not ranked using the non-price factors.

## **Millennia Lite Ordering Guidelines**

When using the best value approach, the CO must create an evaluation plan with a detailed scoring scheme to give an agency as standard by which to judge competing proposals. The scoring system also provides offerors with a fair basis for comparison.

In your weighted criteria, you may have a number of elements and sub-elements to which you attach weights. You also have to attach a scoring grid to determine from that weight how you score somebody high, score somebody in the medium range, and score somebody low.

A scoring grid should detail the information expected of the bidders, the rating value allocated to each evaluation criteria and sub-criteria, and the scoring method that will be used to assess the evaluation criteria. (See Appendix N for "Sample Scoring Grid")

Overall the evaluation seeks to select for award the offeror that best satisfies the Government's needs. In terms of procedure, the proposal is evaluated consistent with the evaluation factors identified in the SOW, and the standards, scoring and weighting elements which are the most essential part of the Government's evaluation and selection plan.

### **Negotiation and Award**

It is a sound practice for the solicitation to call for initial proposals that represent the offerors' best approach and pricing. This statement should put the offeror on notice that the Government may simply award without negotiation. (Award without discussion is not recommended for Cost Reimbursement task orders.) If the Government determines that negotiations should take place, then all contractors submitting proposals must be notified of the place and time for negotiations. After negotiations, best and final offers (BAFOs) are requested and the final evaluation process takes place.

Task orders will be awarded to the offeror whose proposal is determined to best meet the needs of the Government after consideration of all factors. The CO shall make award to the winning offeror<sup>1</sup> using a GSA Form 300 (or other appropriate form) incorporating the SOW and the final proposal by reference. This task order authorizes the contractor to proceed based upon the agreed technical requirements, delivery schedule, and total price. Note that sufficient funds must be available before a task order is issued. Individual organizations will dictate the procedure for receipt, processing, and acceptance of funds.

The CO's selection decision shall be final and shall not be subject to the protest or disputes provisions of the contract, except for a protest that the order increases the scope, period, or maximum value of the contract. The contractor may, however, appeal to the Agency Ombudsman for an independent review of the task order evaluation process and selection decision.

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<sup>1</sup> Unsuccessful offerors shall be notified and a debriefing provided upon request.



## **Millennia Lite Ordering Guidelines**

It is very important to remember that if you say you're going to select on a best value approach and you lay out criteria, you must follow those criteria. If the rules are changed, averted, or ignored, disorder will ensure, exposing the key players to risks and losses. Once the rules are laid down, everybody has to play by them.

### **A. Awarding Options**

Options may be included in task orders in accordance with FAR Part 17.2. Funding for an individual option must be available prior to exercising the option, and no continuation of service shall be permitted until the option has been exercised by executing the necessary task order modification.

### **B. Federal Procurement Data System (FPDS)**

Accurate reporting to Congress of the dollar amount of task orders will be input to the FPDS. When GSA is placing an order for itself or on behalf of a client, the CO will ensure entry is made to the GPDS. In a direct-order/direct-bill situation, the CO with appropriate delegation of authority will ensure the appropriate entry is made to the FPDS.

### **Debriefs**

FAR 16.505, Ordering under Multiple Award Contracts, does not require a formal debrief. However, it is advisable and in the best interest of the Government to provide a contractor with as much information as prescribed under FAR 15.506, Post-Award Debriefing of Offerors. Information pertaining to a contractor's strengths and weaknesses provides insight and will assist the contractor in becoming more competitive while also benefiting the Government over the life of the contract. (See Appendix M for sample Debrief.)

A debrief provides open and honest communication between the Government and the contractor regarding the strengths and weaknesses of the proposal. By providing information that allows the contractor to improve on their weaknesses and capitalize on their strengths, a stronger proposal can be achieved when the contractor competes for a similar task order. The debrief can also reassure the contractor that their evaluation was achieved objectively and in accordance with the prescribed award methodology.

At task award the CO notifies all non-awardees which vendor is being awarded the task order. The notification shall include a brief, supporting evaluation rationale explaining the basis for ranking each evaluation criteria. Provision of this information shall serve as input to the contractor debriefs, although it may be supplemented by a more formalized debriefing upon specific written or electronic request of the contractor.

If a non-awardee has questions as to why their company was not selected, the contractor may direct written or verbal questions to the CO. The CO may discuss with the contractor why that contractor was not selected. However, the CO may not:

## **Millennia Lite Ordering Guidelines**

- Identify or discuss the specifics of other contractors' results,
- Identify and compare contractors' proposals,
- Allow the contractor access to the award documentation and recommendation, or
- Reveal any information prohibited from disclosure by FAR 24.202 or exempt from release under the Freedom of Information Act such as trade secrets, privileged manufacturing processes or techniques, commercial and financial information, and the names of individuals providing past performance information.

The debriefing should be provided within a reasonable period of time after award.

### **Task Order Modifications**

Task orders may be changed either at the Government's initiative, or in response to a contractor's proposal. No direction changing the requirements of a task order will be binding upon the contractor unless issued by the CO. Likewise; the Government shall not be liable for an equitable adjustment to the price of a task order for a change unless the CO authorizes the change. Task order modifications are issued by means of a Standard Form 30 (or other appropriate form). (Check regulations on cost reimbursement contracts to be sure this paragraph is accurate for cost reimbursement tasks.)

Modifications are generally made to correct oversights or changes in conditions from the original task order. Modifications are appropriate to change administrative information (names, phone numbers, period of performance dates, etc.) and to alter the scope of a task to a limited extent.

However, if the proposed modification alters the scope of the order for significant additional work, or incorporates other major changes, the CO will require a new requirements package for the award of a new task order. The CO makes the determination of whether a change can be incorporated as a modification or requires a new task order be processed. If the CO is in doubt, the issue should be addressed to the MILLENNIA LITE PCO for the appropriate functional area.

Modifications do not require opportunity for consideration to all MILLENNIA LITE awardees if the modification is within scope of the competition that took place at initial task award, and does not incorporate major changes. The modification process only requires that the task changes be incorporated (possibly via negotiation) in a modified task order. The modification will include all of the steps in the original task issuance process that are relevant to the modification being made.

# **Millennia Lite Ordering Guidelines**

## **APPENDIX A**

### **Contract Administration**

#### **Roles**

The roles of the following individuals are integral to the successful initiation, placement and support of MILLENNIA LITE orders. Through their efforts the Government realizes efficient and effective results on both a price and technical level. It is only through close coordination and communication among these individuals that technical requirements are adequately identified and summarily shared with contractor employees who are to perform the work effort. (See Appendix C for Contractor Points of Contact and Appendix B for GSA Points of Contact).

#### **A. MILLENNIA LITE Procuring Contracting Officer (PCO)**

The MILLENNIA LITE PCO shall have overall contractual responsibility for the MILLENNIA LITE contracts. The PCO or his designee is authorized to take actions on behalf of the Government to amend, modify or deviate from the contract terms, conditions, and requirements, to exercise option renewals, to terminate the contract and approve subcontracts at the Master Contract level. Approval of subcontracts at the task order level may be delegated in writing to other COs. The PCO may delegate authority to award tasks to Warranted Contracting Officers. The PCO may also delegate certain other authorities and responsibilities to Contracting Officer's Technical Representatives (COTRs). The PCO may delegate authority on an individual or class basis to issue task orders under the MILLENNIA LITE contracts to GSA COs or other Government agency COs.

#### **B. Contracting Officer (CO)**

COs are delegated responsibility for the administration of task orders issued under the MILLENNIA LITE contracts. The CO is authorized to negotiate, amend, issue or modify task orders, accept or reject deliverables, delegate Contracting Officer's Technical Representative (COTR) authority, as well as other contract administration issues such as resolving payment and performance problems, etc.

#### **C. Contracting Officer's Technical Representative (COTR)**

The COTR serves as the focal point for all task activities. The COTR coordinates the activities of customers, performs liaison activities, and serves as the primary point of contact with the contractors. The GSA COTR provides technical advice and assistance to clients in identifying and defining requirements. The COTR is responsible for tracking contractor performance, timeliness and quality of deliverables, etc. The COTR is responsible for performing acceptance of all supplies and services. The COTR may not make commitments/changes to the price, terms, or delivery provisions nor provides supervisory or instructional assistance to the contractor personnel.

## **Millennia Lite Ordering Guidelines**

Titles for this role include Customer Service Representative (CSR), Information Technology Manager (ITM) and Government Project Manager (PM).

### **D. Client Representative (CR)**

The CR is responsible for monitoring technical performance under the task order for the client agency. The CR has no express or apparent authority under the contracts to make commitments for the Government nor authorize changes to the contract or task order terms and conditions.

## Millennia Lite Ordering Guidelines

### APPENDIX B

#### GSA Millennia Lite Points of Contact

New England Region - Anna Mitchell (617) 565-5769

Northeast & Caribbean Region - George Holt (212) 264-8249

Mid-Atlantic Region - Elizabeth Robertson (610) 455-1475  
Bob Vitelli (215) 656-6326

Southeast Sunbelt Region - Dan Blackburn (850) 435-8494

Great Lakes Region - George G. Miller (312) 886-3831

Heartland Region - Stephen Soffer (816) 926-1600

Greater Southwest Region - Frances Waters (817) 978-3689

Rocky Mountain Region - Carolyn Helstrom (303) 236-7311

Pacific Rim Region - Clarice Flippin (510) 637-3882

Northwest/Arctic Region - Ron Heald (360) 475-6813

National Capital Region – Paulette Ward (202) 708-5419

FEDSIM –		(703) 605-9900
Dept. of the Air Force	Bobby McKenzie -	(703) 605-9850
Dept. of the Army	Tom Brady -	(703) 605-9915
Dept. of Defense	Jackie Lewis -	(703) 605-9820
Dept. of the Navy (incl. Marine Corps)	Vicki Lillicrapp -	(703) 605-9860
Civilian – Domestic	Rick Dillon -	(703) 605-9830
Civilian – Environment	Dave Yeager * -	(703) 605-9856
Civilian – Financial	Bill Kreykenbohm -	(703) 605-9853
Civilian – Global	Vicki Lillicrapp *	(703) 605-9860
Civilian – Judicial	Dave Yeager -	(703) 605-9856
Civilian – Social	Barnie Brown -	(703) 605-9931

\* Acting

## Millennia Lite Ordering Guidelines

### APPENDIX C

#### Contractor Information

**S = Small business**

**SDB = Small, disadvantaged business**

**SWO = Small, woman-owned business**

**SDWO = Small, disadvantaged, woman-owned business**

#### **Functional Area 1**

**Abacus Technology Corporation**

5454 Wisconsin Ave., Suite 1100  
Chevy Chase, MD 20815

**GS07T00BGD0045**

**Anteon Corporation**

3211 Jermantown Rd., Suite 700  
Fairfax, VA 22030

**GS07T00BGD0046**

**CALIBRE Systems, Inc.**

5111 Leesburg Pike, Suite 514  
Falls Church, VA 22041-3206

**GS07T00BGD0047**

**CEEXEC, Inc.**

13921 Park Center Rd., Suite 400  
Herndon, VA 20171

**GS07T00BGD0048**

**Data Networks Corp. (SDWO)**

1840 Michael Faraday Dr., Suite 220  
Reston, VA 20190

**GS07T00BGD0049**

**EDSI (SWO)**

22800 Savi Ranch Parkway, Suite 220  
Yorba Linda, CA 92887

**GS07T00BGD0050**

**SI International, Inc.**

800 S. Frederick Ave., Ste. 204  
Gaithersburg, MD 20877

**GS07T00BGD0051**

**Soza and Co., Ltd.**

8550 Arlington Blvd.  
Fairfax, VA 22031

**GS07T00BGD0052**

## **Millennia Lite Ordering Guidelines**

### **Sytex, Inc.**

766 Shrewsbury Ave.  
Tinton Falls, NJ 07724

**GS07T00BGD0053**

### **User Technology Associates, Inc.**

950 N. Glebe Rd., Suite 100  
Arlington, VA 22203

**GS07T00BGD0053**

## **Functional Area 2:**

### **Anteon Corporation**

3211 Jermantown Rd., Suite 700  
Fairfax, VA 22030

**GS07T00BGD0029**

### **American Systems Corporation**

13990 Park East Circle  
Chantilly, VA 20151

**GS07T00BGD0030**

### **AverStar**

1595 Spring Hill Road  
Vienna, VA 22182

**GS07T00BGD0031**

### **Computer Technology Associates, Inc.**

6903 Rockledge Road  
Bethesda, MD 20817

**GS07T00BGD0032**

### **GRC International, Inc.**

1900 Gallows Rd.  
Vienna, VA 22182

**GS07T00BGD0033**

### **Nichols Research**

4090 S. Memorial Parkway  
Huntsville, AL 35802

**GS07T00BGD0034**

### **New Technology Management, Inc. (SDWO)**

10461 White Granite Dr., Suite 104  
Oakton, VA 22124

**GS07T00BGD0045**

### **QSS Group, Inc. (S)**

4500 Forbes Blvd., Suite 200  
Lanham, MD 20706

**GS07T00BGD0036**

### **Sentel Corporation**

225 Reinekers Lane, Suite 500  
Alexandria, VA 22314

**GS07T00BGD0037**

## **Millennia Lite Ordering Guidelines**

### **Sherikon, Inc.**

14500 Avion Parkway, Suite 200  
Chantilly, VA 20151

**GS07T00BGD0038**

### **Systems Technology Associates, Inc.**

4040 East Bijou St.  
Colorado Springs, CO 80909

**GS07T00BGD0039**

## **Functional Area 3:**

### **ACS Government Solutions Group**

One Curie Court  
Rockville, MD 20850

**GS07T00BGD0019**

### **Advanced Technology Systems, Inc.**

7915 Jones Branch Drive  
McLean, VA 22102

**GS07T00BGD0020**

### **Century Technologies**

962 Wayne Ave., Suite 500  
Silver Spring, MD 20910

**GS07T00BGD0021**

### **Computer Systems Technology**

1525 Perimeter Parkway, Suite 325  
Huntsville, AL 35806

**GS07T00BGD0022**

### **EER Systems**

3750 Centerview Drive  
Chantilly, VA 20151

**GS07T00BGD0023**

### **FC Business Systems**

8001 Braddock Rd., Suite 300  
Springfield, VA 22151

**GS07T00BGD0024**

### **ITS Federal (S)**

2300 Alessandro Dr., Suite 215  
Ventura, CA 93002

**GS07T00BGD0025**

### **Rose International, Inc. (SDWO)**

16401 Swingley Ridge Rd., Suite 300  
Chesterfield, MO 63017

**GS07T00BGD0026**



## **Millennia Lite Ordering Guidelines**

### **Sherikon, Inc.**

14500 Avion Parkway, Suite 200  
Chantilly, VA 20151

**GS07T00BGD0027**

### **VGS (S)**

10302 Eaton Place, Suite 150  
Fairfax, VA 22030

**GS07T00BGD0028**

## **Functional Area 4:**

### **Allied Technology Group**

1803 Research Blvd., Suite 601  
Rockville, MD 20850

**GS07T00BGD0055**

### **Anteon Corporation**

3211 Jermantown Road, Suite 700  
Fairfax, VA 22030

**GS07T00BGD0056**

### **BTG, Inc.**

3877 Fairfax Ridge Road  
Fairfax, VA 22030

**GS07T00BGD0057**

### **CACI**

1100 N. Glebe Road  
Arlington, VA 22201

**GS07T00BGD0058**

### **Computer and Hi-Tech Management, Inc. (SDB)**

7926 Jones Branch Drive, Suite 600  
McLean, VA 22102

**GS07T00BGD0059**

### **Federal Data Corp.**

1700 Research Blvd.  
Rockville, MD 20850

**GS07T00BGD0060**

### **Keane Federal Systems, Inc.**

2525 Meridian Parkway, Suite 400  
Durham, NC 27713

**GS07T00BGD0061**

### **Madison Research Corp. (SDB)**

401 Wynn Dr.  
Huntsville, AL 35805

**GS07T00BGD0062**

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**Signal Corp.**

3040 Williams Drive, Suite 200  
Fairfax, VA 22031

**GS07T00BGD0063**

**Systems Research and Applications Corporation**

4350 Fair Lakes Ct.  
Fairfax, VA 22030

**GS07T00BGD0064**

**Sterling Software (U.S.), Inc.**

1650 Tyson Blvd., Suite 800  
McLean, VA 22102-3915

**GS07T00BGD0065**

**TRW, Inc. Systems and Information Technology Group**

One Federal Systems Park Drive  
Fairfax, VA 22033

**GS07T00BGD0066**

## Millennia Lite Ordering Guidelines

### APPENDIX D

#### Memoranda of Understanding (MOU) and Delegation of Authority

##### MOU between IT Solutions and Client Agency

Control Number: \_\_\_\_\_

1. Purpose. This MOU establishes an interagency agreement between GSA IT Solutions and the Client<sup>1</sup>. This agreement is effective when signed by GSA and the Client.
2. Scope. Under this MOU, GSA IT Solutions will provide support services to the client through delivery/purchase orders issued on behalf of the client.
3. GSA Responsibilities. GSA will assign the necessary personnel determined by the contract used and the level of service ordered by the client. GSA assigned personnel includes COs, technical representatives, and financial managers. Depending on the level of service ordered by the client, GSA will:
  - a) provide access to various GSA requirements and multiple award contracts;
  - b) provide assistance to client officials seeking and receiving services;
  - c) review and evaluate requests for service to determine if the requests are within the scope of available contract vehicles;
  - d) review and evaluate offerings under one or more contracts in order to satisfy the client's requirements;
  - e) issue delivery or purchase orders, as well as any necessary change orders;
  - f) resolve contractual problems or issues, and adjudicate disputes with the contractor;
  - g) ensure the contractor complies with the terms and conditions of the contract; and
  - h) pay invoices for services that flow through the IT fund and bill the client agency for reimbursable services.
4. Client Responsibilities. The client shall:
  - a) ensure that this MOU is signed by an official who is authorized to commit client funds and sign interagency agreements;
  - b) comply fully with client agency's procurement regulations and policies; ensure the agency's compliance with Circular A-76 in matters related to this interservice support agreement;
  - c) determine and communicate its requirements to GSA;

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<sup>1</sup> This MOU is used when GSA IT Solutions is acting as an agent in placing MILLENNIA LITE orders for the client agency.

## Millennia Lite Ordering Guidelines

- d) provide full funding for costs described in paragraph 6 (Costs) for all products and services ordered, ensuring that an official who is authorized to obligate funds signs the funding document;
- e) advise the GSA immediately of any problems with the vendor that may affect delivery or cost of completed orders;
- f) receive and accept services in a timely manner;
- g) provide timely information so that GSA and the client's paying office may comply with all provisions of the Prompt Payment Act; and
- h) pay invoices for services for which the client provided a direct fund citation, including any associated interest penalties because of its late payments.

### 5. Funding:

- a) Reimbursable funds are obligated to the Information Technology (IT) Fund pursuant to this agreement upon the issuance of a funding document by the client. GSA will not issue any delivery/purchase orders prior to its receipt of a funding document. The funding document will cite the amount being obligated by the client and will describe the agency requirement that will be met by the order. The amount being obligated by the client includes the anticipated value of the order(s) to be issued to the contractor plus any applicable GSA surcharges for recovery of GSA's costs of doing business. GSA will not issue a delivery/purchase order in excess of the funds obligated by the client. The funding document will contain a certification signed by an agency official having authority to obligate the funds, and cite the office to contact if there is a need to discuss payment problems.
- a) Direct funds cite funding documents are signed and accepted by GSA. This document is obligated by the client's accounting and disbursement office for payment of the vendor's invoice by the indicated office. The original signed copy and copies of the GSA Form 300, or other appropriate form will be sent to the client with a copy attached to the contractor's copy of the 300. All delivery/purchase orders issued by GSA will cite the client's order number and line of accounting.
- b) Credit cards are recommended for delivery/purchase orders under one hundred thousand dollars per order. GSA will charge the amount of the vendor's invoice plus any applicable GSA surcharge to the client's credit card.

6. Costs. The client will reimburse GSA for costs of services provided by each delivery/purchase order (reimbursable funds) or pay the contractor directly upon rendering of a proper invoice (direct fund cite). Costs of services include the amounts due the contractor plus any applicable surcharges for recovery of GSA's costs of doing business. The client will help GSA avoid interest penalties by providing GSA with any necessary information within 10 days of receipt of the goods or services. If interest penalties are incurred, because the client has not provided timely receiving information, the client agrees to compensate GSA for the resultant interest penalties.

### 7. GSA Billing and Payment.

## Millennia Lite Ordering Guidelines

- a) GSA will pay all charges for delivery/purchase orders from the Information Technology fund on a reimbursable basis, unless other agreements have been made (described in paragraph 5). Report of ITF Services Performed, GSA 789 voucher or TFS Form 7306, On Line Payment and Collection (OPAC), as applicable, will be used and shall be paid as rendered within 15 days.
- b) The client is responsible for prompt payment of all billings. All reimbursable billings are delinquent when they are 45 days or more overdue.
- c) When billings remain delinquent over 90 days and the client has not indicated a problem regarding services, GSA will not issue any new orders or modifications to existing orders for that client, and termination of existing services will be considered by GSA and negotiated with the client.

8. Cancellation. This agreement or any delivery order/purchase order issued under this agreement may be canceled in 30 calendar days by written notice by either party. If this agreement, or any order under this agreement is canceled, the client assumes responsibility for all costs resulting from the cancellation.

9. Disputes and Protests. If a dispute or protest arises from the specifications, solicitation, award, performance or termination of a delivery/purchase order and the contractor appeals or protests to a forum such as the GSA Board of Contract Appeals, the General Accounting Office, or a Federal court, and the forum makes an award in favor of the offeror or contractor, additional funding may be required.

## Millennia Lite Ordering Guidelines

### MOU between GSA FTS Information Technology Acquisition Center And Client Agency

Control Number: \_\_\_\_\_

1. Purpose. This MOU establishes an interagency agreement between the GSA Federal Technology Service (FTS) Information Technology Acquisition Center (ITAC) and the client agency for direct order/direct bill tasks. This agreement is effective when signed by GSA and the client.
2. Scope. Under this MOU, GSA will provide support services to the client through delivery orders issued to Millennia Lite contractors.
3. GSA Responsibilities:
  - a) GSA will issue Delegations of Authority to client CO(s);
  - b) GSA will inform clients of all modifications to Millennia Lite contracts; and
  - c) GSA will review task order files on a sampling basis once a year.
4. Client Responsibilities:
  - a. Client will ensure that this agreement is signed by an official who is authorized to sign interagency agreements;
  - b. Client will comply fully with their agency's procurement regulations and policies;
  - c. Client will provide a copy of any delivery orders placed by the client agency to the Millennia Lite PCO within seven calendar days of award;
  - d. Client will administer Millennia Lite contracts in accordance with Millennia Lite contract terms and conditions and mandates of the Federal Acquisition Regulation; and
  - e. Upon request, the client will provide the Millennia Lite PCO access to task order files for review.
  - f. Client GSA will review task order files on a sampling basis once a year.

# Millennia Lite Ordering Guidelines

## Delegation of Authority

### SAMPLE



## U. S. General Services Administration

### Delegation of Administrative Contracting Officer Authority (ACO) - Assignment Contract Administration – MILLENNIA LITE Contracts

February 4, 1999

MEMORANDUM FOR ADDRESSEES LISTED BELOW  
FEDSIM CONTRACTING CENTER (TFG)

FROM: KATHY GARRETT  
PROCURING CONTRACTING OFFICER  
FTS, Information Technology Acquisition Center

SUBJECT: Delegation of Administrative Contracting  
Officer Authority (ACO) - Assignment of Contract Administration -  
MILLENNIA LITE Contracts

This memorandum delegates Administrative Contracting Officer (ACO) responsibilities to \_\_\_\_\_, effective \_\_\_\_\_, 2000, as described below and pursuant to FAR 42.302 and GSAM 542.302, (need to verify FAR and GSAR references in this memo) for the following MILLENNIA LITE contracts:

- 1.
- 2.
- 3.
- 4.
- etc.

Along with the contract administration functions listed at FAR 42.302(a), the ACO authority to perform the following specific functions pursuant to FAR 42.302(b) and GSAM 542.302(b) is also delegated. Additionally, as Administrative Contracting Officer you are authorized to:

## Millennia Lite Ordering Guidelines

1. Assign contracting Officer's Technical Representative (COTR) responsibilities and work closely with the COTR in technical contract administration. Assure that the COTR is apprised of his/her specific responsibilities and authority, as well as limitations thereof. Copies of the assignment letter must be provided to the PCO so that the PCO may advise the Contractor.
2. Place all orders under the contract that are determined to be within the scope of the contract and your delegation. All orders shall be administered by the ACO.
3. Terminate individual orders for convenience or default in accordance with the terms and conditions of the contract.
4. Respond to any Freedom of Information Act (FOIA) requests in relation to delivery orders and applicable post-award contract actions.
5. Serve as the central point for coordinating liaison with the contractor and with ordering agencies; assist by clarifying contract terms and contractor responsibilities or successful contract performance. Provide the Contractor and agencies with final written interpretations of contract terms and conditions.
6. Assure timely performance of delivery orders and monitor compliance with the terms and conditions of the Delivery Orders under the terms of the contract. Take appropriate action to protect the Government's interests under the terms of the contract.
7. Report to the PCO any inadequacies in contract specifications and recommend corrective action thereof.
8. Monitor contractor compliance with EEO provisions of the contract and resolve problems of non-compliance.
9. Monitor contractor compliance with safety requirements, including handling of hazardous materials. Identify any instances on non-compliance and take appropriate action. Conduct follow-up activities to ensure that corrective measures are employed.
10. Monitor contract expenditures of all delivery orders within your authority, and provide the information as required to the Project Manager.
11. Prepare findings and fact and furnish to the PCO recommendations thereof relative to (a) institution of termination procedures; and (b) any disputes arising under the contract. Recommend the issuance of show-cause, cure, and stop-work order notices as appropriate. Additionally, issue these instruments when requested by the PCO.
12. Approve or disapprove subcontract requests, up to the limitation of your warrant.



## **Millennia Lite Ordering Guidelines**

Any additional contract administration functions not listed in 42.302(a), and specifically delegated above pursuant to 42.302(b), remain the responsibility of the PCO.

Please acknowledge your assumption of the ACO responsibilities as set forth in this memorandum by signing the acknowledgment line on the enclosed copy of this memorandum and returning the signed copy to me.

If there are any questions about this delegation, I can be reached at 817/978-3434.

\_\_\_\_\_  
ACO SIGNATURE

\_\_\_\_\_  
DATE

ADDRESSEES:

# **Millennia Lite Ordering Guidelines**

## **APPENDIX E Statement of Work Templates**

### **SAMPLE 1**

#### **Firm Fixed Price**

#### **1.0 Introduction**

- 1.1 Organization
  - 1.1.1 Identification and Address
  - 1.1.2 Agency Mission
- 1.2 Project Background and Objectives
- 1.3 IT/Networking Environment
  - 1.3.1 Services
  - 1.3.2 Hardware
  - 1.3.3 Software
  - 1.3.4 Networking

#### **2.0 Technical Services Required**

- 2.1 Task Description
  - 2.1.1 Scope of Work
  - 2.1.2 Statement of Work
    - 2.1.2.1 Milestone I
      - 2.1.2.1(a) Deliverable #1
    - 2.1.2.2 Milestone II
      - 2.1.2.1(a) Deliverable #2
    - 2.1.2.2 Milestone III
      - 2.1.2.3(a) Deliverable #3

## **Millennia Lite Ordering Guidelines**

2.2 Acceptance Criteria

2.3 Expertise

2.4 Delivery Instructions

2.5 Other Direct Costs

2.5.1 Incidental Supplies, Equipment and Materials

2.5.2 Travel Requirements

2.6 Travel and Per Diem

2.7 Other Unique Costs

### **3.0 Government Furnished Resources**

3.1 Facilities, Supplies and Services

3.2 Information Sources

3.3 Documentation

### **4.0 Contractor Furnished Resources**

4.1 Facilities, Supplies and Services

### **5.0 Administrative Considerations**

5.1 Government Contacts

5.1.1 Acquisition

5.1.2 Technical

5.1.3 Client Representative (CR)

5.2 Place of Performance/Work Location

5.3 Hours of Work

5.4 Period of Performance

5.5 Security and Privacy

## **Millennia Lite Ordering Guidelines**

### **5.6 Personal Services**

*The Client has determined that use of the GSA contract to satisfy the requirements of the task order is in the best interest of the Government, economic and other factors considered, and this task order is not being used to procure personal services prohibited by Subpart 37.1 of the Federal Acquisition Regulation (FAR).*

### **5.7 Government Review**

#### **5.7.1 Reports**

(As directed by the Government these reports shall be prepared as defined in Millennia Lite, the SOW, or work orders.)

## **5.0 Special Instructions**

### **5.1 General and Miscellaneous**

### **5.2 Unique Reporting Requirements** (To be proposed by offerors, if applicable)

## **7.0 Standards and References** (To be proposed by offerors, if applicable)

## **8.0 Evaluation Criteria** (See Appendix F for sample criteria)

## **9.0 Method of Award** (See Appendix O for sample)

# **Millennia Lite Ordering Guidelines**

## **Statement Of Work Templates**

### **Sample 2**

#### **Time and Materials**

#### **1.0 Introduction**

- 1.1 Organization  
Place of Performance of this task
- 1.2 Objective and Task Description
- 1.3 IT/Networking Environment
  - 1.3.1 Hardware
  - 1.3.2 Software
  - 1.3.3 Networking

#### **2.0 Requirements**

- 2.1 Technical Task Description
- 2.2 Deliverables  
*The Contractor will be responsible for delivering all end items specified in the Work Orders as well as the Work Order forms themselves, to the Client Representative. The Contractor will maintain a file of started, completed and ongoing work order forms. All deliverables must meet professional standards and the requirements set forth in the contract and work orders.*
- 2.3 Security and Privacy

#### **3.0 Government Furnished Resources**

- 3.1 Facilities, Supplies and Services

#### **4.0 Contractor Furnished Resources**

- 4.1 Facilities, Supplies and Services

#### **5.0 Administrative Considerations**

- 5.1 Points of Contact

## **Millennia Lite Ordering Guidelines**

5.2 Task Work Hours

5.3 Travel

### **6.0 References**

### **7.0 Resources Required (Optional)**

The paragraph may include such language as:

*"In accordance with the Staffing Guidelines of the Contract, historical data, or in the professional judgment of the Government technical point of contact, the requirements identified in this document can be accomplished with the level of staffing delineated below."*

The estimated Skill Level number, regular hours, overtime, and/or additional hours (for other than Wage Determination skill levels) will be listed here.

### **8.0 Evaluation Criteria** (See Appendix F for sample criteria)

### **9.0 Method of Award** (See Appendix O for sample)

# Millennia Lite Ordering Guidelines

## Statement of Work Templates

### SAMPLE 3

#### Time and Materials

#### 1.0 Background

#### 2.0 Scope and Objectives

#### 3.0 Statement Of Work

##### 3.1 Task 1 - Task Description

###### 3.1.1 Task 1.1

###### 3.1.2 Task 1.2

##### 3.2 Task 2 - Task Description

##### 3.3 Task 3 - Task Description

#### 4.0 Period of Performance

##### For Firm Fixed Price (FFP)

The Project Start Date shall be within *(insert appropriate number of working days here - must match Milestones and Deliverables schedule)* working days after task order award.

##### For Time and Materials (T&M)

The Period of Performance for this task order is from date of award through \_\_\_\_\_ *(enter calendar days, weeks, or months, as appropriate)*. Exercise of any options to extend the term of this task order will extend the period of performance through the specified delivery schedule for the exercised option. However, the total duration of this task order, including the exercise of any options, shall not exceed \_\_\_\_\_ *(calendar days, weeks, or months, as appropriate)*  
*When calculating the period of performance begin at date of award and end 8 weeks beyond the final deliverable to allow for acceptance of that deliverable.*

##### 4.1 Task Order Schedule and Milestone Dates

## **Millennia Lite Ordering Guidelines**

The following schedule of milestones will be used to monitor timely progress on this task order. Date of Award designates Project Start. This schedule is required to meet mission objectives. Variances to this schedule will be reviewed and may or may not be acceptable.

### **4.2 Place(s) of Delivery**

All correspondence and reports related to this task order exclusive of the deliverables shall be delivered to the CO at the following location or as specified in each task order.

Each copy of all correspondence and reports related to this task order including the deliverables shall be delivered to the designated Government points of contact.

## **5.0 Assumptions, Conditions, or Exceptions**

Offerors shall identify and document all (if any) assumptions, conditions, or exceptions upon which the technical part of this proposal is based. All assumptions (both technical and price) shall be included in the oral presentation.

## **6.0 Method of Award** (See appendix O for sample)



## Millennia Lite Ordering Guidelines

### APPENDIX F

#### Evaluation Criteria

The evaluation criteria listed below are examples and are not meant to be all-inclusive. Government representatives are encouraged to establish their own criteria and factors to ensure quality competition and provide the greatest value to the task order procurement. A letter format to notify the contractors of the evaluation criteria may also be in order.

Judiciously limit evaluation criteria to those factors most important to the source selection. Award factors should be held to a minimum. The factors selected (which should be limited to the most critically important), should be included and described in relative order of importance – most important to least important. A total of three evaluation factors is the norm; more than five may be excessive.

#### Sample Evaluation Criteria

##### 1. Past Performance

- Describe *(insert number)* projects your firm has completed similar in scope to the SOW. Include points of contacts and their phone numbers, and titles. Each reference shall include a contracting and technical point of contact.
- The Government may supplement the information you provide with any other information it may obtain from any other source including its own experience with your firm, or information concerning your performance from any other reliable source.

##### 2. Past Experience

- Describe projects your firm has or is working on that address the kinds and types of requirements specifically called out in the SOW. Direct experience with the specific systems of the client identified in the SOW should be called out as well as experience with similar systems of other agencies.

##### 3. Technical Approach

- Describe your knowledge and understanding of the requirement(s) as outlined in the SOW
- The technical approach must identify the methodology and analytical techniques you shall use to fulfill the technical requirements. The technical approach should clearly describe the following:
  - An overview of your methodology guiding your performance of the technical requirements identified in the SOW, and a general

## **Millennia Lite Ordering Guidelines**

description of how your technical approach will be applied to accomplishing the requirements.

- The logical sequence of tasks that you will perform to accomplish the requirements. Identify and describe the specific techniques and steps that will be applied during the accomplishment of all tasks of this project.
- The deliverables to be produced in response to the requirements.
- Describe your qualifications and corporate capabilities specifically related to perform the work required in the SOW
- Current task requirements and your plan for transition.

### **4. Management Approach and task order administration**

- Describe your plan to both staff and manage the services required in the SOW.
- Include information detailing status reporting, the location of management offices, proposed teaming/subcontracting arrangements to be used in support of the task requirements.

### **5. Staffing Plan**

- List personnel and skill level categories available to work on start-up date (include special qualifications of key personnel).
- Identify key personnel assigned to the project, certify that the information on each key personnel submitted is true and complete and that the individuals named are available for assignment the date the task order is effective. As a minimum, and unless otherwise specified in this task order, the person designated to manage the project must be identified.
- Individuals designated as key personnel will be committed to the project for its duration and cannot be substituted or replaced without the written agreement of the CO.
- The plan must include names of personnel proposed, their skill category, and an estimated number of hours by labor categories. The Plan must be definitive enough to provide the Government a clear understanding of how the offeror intends to staff this task order to meet all requirements, including the delivery schedule.

### **6. Project Plan**

- The project plan shall provide for each requirement and deliverable, scheduled milestones, task staffing by labor category, and functional flow for the project.
- The specific format of the project plan can be determined by the offeror, but an integrated combination of graphics (e.g., Gantt or PERT charts) and narrative presentation is expected.
- At a minimum the project plan must clearly indicate on a schedule the following items as applicable to the technical requirements:

## Millennia Lite Ordering Guidelines

1. Start and completion dates for tasks to be performed (including subtasks if appropriate). Dates shall be expressed as the number of calendar days from date of award.
2. Deliverables and planned delivery schedule including dates, description, quantities and place of all deliverables.
3. Milestones (e.g., management briefings and progress reports).
4. Staffing, with special emphasis on the assignments of key personnel and subcontracting arrangements, if any. Describe the personnel assigned, by skill category, and an estimated number of hours for ALL labor categories required. Staffing should include project responsibilities.

### 7. Price

- Provide prices that are both reasonable and realistic - A completed project staffing plan table shall be submitted with the price proposal.

## Millennia Lite Ordering Guidelines

### APPENDIX G

#### Evaluation Standards, Scoring and Weighting Factors

As described above, the SOW will include the evaluation criteria – that is to say, the most important factors to be considered when the proposals are evaluated.

The evaluation standards listed below are provided as examples and are not meant to limit the approaches one could take as it relates to establishing or setting the bar for proposal evaluation.

The following example contains three evaluation criteria; Past Experience, Technical Approach and Staffing Plan.

#### Standards

##### 1. Past Experience

**Exceeds the standard** - The offeror has provided more than the three projects that were required by the SOW and are similar to the project requirements included in the SOW; or the offeror has provided three projects which were required by the SOW and are similar to the project requirements included in the SOW, one of which is identical to that cited in the SOW.

**Meets the standard** - The offeror has provided three projects which were required by the SOW and are similar to the project requirements included in the SOW.

**Falls somewhat short of the standard** - The offeror has provided only one or two projects that were required by the SOW and are similar to the project requirements included in the SOW.

**Unacceptable** - The offeror has provided no projects as required by the SOW.

##### 2. Technical Approach

**Exceeds the standard** - The offeror provides a proposal which addresses all technical requirements of the SOW and is indicative of an understanding of all technical requirements of the SOW; additionally the proposal provides tracking systems to guarantee timeliness in performance.

**Meets the standard** – The offeror provides a proposal, which addresses all technical requirements of the SOW and is indicative of an understanding of all technical requirements of the SOW.

**Falls somewhat short of the standard** - The offeror provides a proposal, which addresses most technical requirements of the SOW and is indicative of an understanding of said technical requirements of the SOW.

**Unacceptable** - The offeror provides a proposal, which addresses only a marginal portion of the technical requirements of the SOW and lacks an understanding of said technical requirements.

## Millennia Lite Ordering Guidelines

### 3. Staffing Plan

**Exceeds the standard** - The offeror has provided a proposal that plans for staffing in advance of the time frame required by the SOW.

**Meets the standard** - The offeror has provided a proposal that plans for staffing within the time frame required by the SOW.

**Falls somewhat short of the standard** - The offeror has provided a proposal that plans for staffing somewhat short but reasonably close to the time frame required by the SOW.

**Unacceptable** - The offeror provides a proposal which does not address staffing plans or provides a plan for an unreasonable timeline for staffing the project.

### Scoring

The following scores might be applied to the above cited evaluation standards.

#### Past Experience

Exceeds the standard	3 points
Meets the standard	2 points
Falls somewhat short of the standard	1 point
Unacceptable	0 points

#### Technical Approach

Exceeds the standard	3 points
Meets the standard	2 points
Falls somewhat short of the standard	1 point
Unacceptable	0 points

#### Staffing Plan

Exceeds the standard	3 points
Meets the standard	2 points
Falls somewhat short of the standard	1 point
Unacceptable	0 points

Scoring is done independently by each technical team member. A consensus on each factor must be reached among the technical team members before the final scoring and award recommendation can be provided to the CO.

Note: The numeric approach is but one methodology for scoring; other highly successful approaches to scoring have included colors (i.e. green = good, yellow = fair, red = bad), and adjectives (i.e. good, fair, poor).

### Weighting Factors

## Millennia Lite Ordering Guidelines

If the above evaluation criteria had been assigned the following weights; Past Experience - 50%, Technical Approach - 30%, Staffing Plan - 20%, then the following scoring example would apply.

Evaluation Factor	Score	Weight	Weighted Score
Past Experience	3	.5	1.5
Technical Approach	2	.3	.6
Staffing Plan.	2	.2	.4
<b>Totals:</b>	<b>7</b>	<b>1</b>	<b>2.5</b>
<b><u>TOTAL SCORE</u></b>			<b><u>2.5 out of a possible 3.0</u></b>

### Additional Examples

The following charts provide additional examples of factors and scoring methods that can be used in architecting an approach to proposal evaluation.

## Millennia Lite Ordering Guidelines

### TECHNICAL PERFORMANCE

<b>FACTORS/ RATINGS</b>	<b>PLUS (6)</b>	<b>EXCEL- LENT (5)</b>	<b>GOOD (4)</b>	<b>FAIR (3)</b>	<b>POOR (2)</b>	<b>UNSATIS- FACTORY</b>	<b>Not Applicable</b>
1. Completion of major tasks/milestones/d eliverables on schedule.							
2. Responsiveness to changes in technical direction.							
3. Ability to identify risk factors and alternatives for alleviating risk.							
4. Ability to identify and solve problems expeditiously.							
5. Ability to employ standard tools/methods (e.g., standards, commercial products, info. engineering tools).							

## Millennia Lite Ordering Guidelines

### MANAGEMENT PERFORMANCE

<b>FACTORS/ RATINGS</b>	<b>PLUS (6)</b>	<b>EXCEL- LENT (5)</b>	<b>GOOD (4)</b>	<b>FAIR (3)</b>	<b>POOR (2)</b>	<b>UNSATIS- FACTORY</b>	<b>Not Applicable</b>
6. Overall communication with the Government.							
7. Effectiveness and reliability of Contractor's Key Personnel							
8. Ability to recruit and maintain qualified personnel.							
9. Ability to manage multiple and diverse projects/tasks from planning through execution.							
10. Ability to effectively manage subcontractors.							
11. Ability to meet goals for use of Small, Small Disadvantaged, and Woman Owned Small Business subcontractors.							
12. Ability to accurately estimate and control cost to complete tasks.							



## Millennia Lite Ordering Guidelines

13. Overall performance in planning, scheduling, and monitoring.							
14. Use of management tools (e.g. cost/schedule, task management tools).							

## Millennia Lite Ordering Guidelines

### CUSTOMER SATISFACTION

<b>FACTORS/ RATINGS</b>	<b>PLUS (6)</b>	<b>EXCEL- LENT (5)</b>	<b>GOOD (4)</b>	<b>FAIR (3)</b>	<b>POOR (2)</b>	<b>UNSATIS- FACTORY</b>	<b>Not Applicable</b>
15. How would you rate the Contractor's overall technical performance on this contract/order?							
16. How would you rate the Contractor's overall management performance on this contract/order?							
17. How would you rate the Contractor's ability to be cooperative, business-like and concerned with the interests of the customer?							

## Millennia Lite Ordering Guidelines

18. Additional Comments:

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---

19. Would you use contractor again? \_\_ Y \_\_ N (please explain)

---

---

20. List the Major Technical Deliverables delivered during this TO:

Date "Deliverable"

Title	Description	Date Due	Date Recd
Eval. Submitted			

1.

2.

3.

4.

5.

---

Evaluator Name:  
Phone No.

Title:

Date:

## Millennia Lite Ordering Guidelines

### APPENDIX H

#### Notice Of Incumbency

One of the first questions asked on every competitive acquisition is "Who is the incumbent?" Providing all Millennia Lite contractors with preliminary information concerning project incumbency permits the contractors to make informed decisions about proposing and/or developing teaming arrangements on requirements.

While we recognize that FAR 16.505 (b) (3) states, in part, that "...methods, such as allocation or **designation in any way of any preferred awardee(s), that would result in less than fair consideration being given to all awardees prior to placing each order, are prohibited**", advising potential Offerors about incumbent contractors assists the contractors in making informed bid/no bid decisions.

Note, it is a good practice to provide a letter of incumbency even if the incumbent is not a Millennia Lite contractor; providing yet another element of information to assist the contractors in making informed business and technical decisions about proposing.

The sample letters that follow, provide examples of the kind of information that might be included. It is recommended that the letter be forwarded to the contractors in advance of the RFQ. When advising of a possible "logical follow-on" acquisition, if any of the non-incumbent contractors indicate an interest in proposing, the RFQ will be sent to all Millennia Lite contractors under the Functional Area your requirement fit.

**Sample 1 covers follow-on to order issued competitively to a Millennia Lite contractor under another GSA contract.**

**Sample 2 covers follow-on to order issued competitively to a Millennia Lite contractor under another agency's contract.**

**Sample 3 covers an order, which appears to be an appropriate "logical follow-on" under the Millennia Lite contract, but we wish to ascertain if any other Millennia Lite contractor would compete.**

**Sample 4 covers an order to be competed under Millennia Lite when the incumbent is a Millennia Lite contractor.**

**Sample 5 covers an order to be competed under Millennia Lite when the incumbent is not a Millennia Lite contractor.**

## Millennia Lite Ordering Guidelines

### Sample 1

April 9, 1999

Notice To All Multiple Award Contractors under RFP GS-O00-000

GSA has been asked to support the XYZ Division in its assessment of Situation Awareness Beacon with Reply performance at the All Service Combat Identification Evaluation Team 1999 Joint Demonstration scheduled for late August/early September in Barstow, California. Under GSA's previously awarded contract, ABC Company, a current Millennia Lite, Functional Area 3 contractor, was awarded an order to provide support to XYZ Division in this area. Had the order been awarded under the Millennia Lite contract, this would appear to be a logical follow-on, which could be directed. However, I am providing this notice to determine if you are interested in competing for this small requirement. If not, I plan to issue the order directly to ABC Company. The contemplated effort is not expected to exceed \$25,000.

Please respond no later than 11:00 a.m., April 12, 1999, regarding whether or not your firm would be interested in proposing on such a requirement. No response from you by April 12, 1999 will be considered as an indication that your firm is not interested. Please fax response to (510) 555-1212.

Sincerely,

JOHN DOE  
Contracting Officer  
FTS Acquisition Services Division

## Millennia Lite Ordering Guidelines

### Sample 2

April 9, 1999

Notice To All Multiple Award Contractors under RFP GS-000-000

GSA has been asked to provide support to the XYZ Division, for the continued development, implementation, training, and maintenance support of systems that have been developed and are being maintained under the XYZ Division's Scientific and Engineering (S&E) Contract.

As the incumbent S&E contractor, ABC Company, a current Millennia Lite, Functional Area 3 contractor, has extensive knowledge of the program and is uniquely positioned to provide uninterrupted system support. This requirement, limited to the existing systems and the one remaining system already under development, would appear to be a logical follow-on which could be directed under the S&E contract vehicle. The mandatory requirement would provide for continued system development support for the XYZ Division's Development Tracking System Division (DTS) as it transitions into an operational system, and related maintenance, development and modification support for the systems maintained by XYZ Division. DTS is an Internet accessible tracking system that allows the Navy involved in the DTS to track the status of implementing actions that satisfy a capability deficiency in doctrine, training and education, organization, facilities and support. The S&E contract includes similar support to other Navy activities, for continuing maintenance of systems previously developed by ABC Company under the S&E contract.

Support under the contemplated task order would be limited to the DTS and those systems/activities currently being maintained under the S&E contract. I am providing this notice to determine whether you are interested in competing for this requirement. If not, I plan to issue the order directly to ABC Company. The task order would be for one (1) year and four (4) option years, with an initial commitment estimated at \$1 million.

Please provide your response no later than 11:00 am, April 14, 1999, whether or not your firm would be interested in proposing on such a requirement. No response from you by that date will be considered as an indication that your firm is not interested. You may submit your response by facsimile to the undersigned at (510) 555-1212. Early responses are appreciated.

Sincerely,

JOHN DOE  
Contracting Officer  
FTS, Acquisition Services Division

## Millennia Lite Ordering Guidelines

### Sample 3

April 9, 1999

Notice To All Multiple Award Contractors Under RFP GS-O00-000

ABC Company, a current Millennia Lite, Functional Area 3 contractor, is currently providing data system and administrative support to the South Base, Telecom Division Office under an order issued earlier under the Millennia Lite contract. ABC Company has been performing the work for the past two years and performance is considered good. The current skill level or skill level(s) for this contract is/are as follows: (optional: provide descriptions of skill levels, or any other background information necessary to provide all multiple awardees sufficient information to propose on this task). Support for this task order effort is limited to those systems/activities currently maintained under the existing order. While this order could be issued directly as a "logical follow-on", this notice is provided to advise you of the fact that ABC Company is currently performing the work and to determine if any Millennia Lite, Functional Area 3 contractor desires to compete for this follow-on. If not, I plan to issue the order directly to ABC Company.

Please provide your response no later than 11:00 am, April 14, 1999, whether or not your firm would be interested in proposing on this requirement. No response from you by that date will be considered as an indication that your firm is not interested. You may submit your response by facsimile to the undersigned at (510) 555-1212. Early responses are appreciated.

Sincerely,

JOHN DOE  
Contracting Officer  
FTS Acquisition Services Division

## Millennia Lite Ordering Guidelines

### Sample 4

April 9, 1999

Notice To All Multiple Award Contractors Under RFP GS-O00-000

ABC Company, a current Millennia Lite, Functional Area 3 contractor, is currently providing data system and administrative support to the South Base, Telecom Division Office under a GSA Facilities Management Contract. ABC Company has been performing the work for the past three years and performance is considered good. The current skill level or skill level(s) for this contract is/are as follows: (optional: provide descriptions of skill levels, or any other background information necessary to provide all multiple awardees sufficient information to propose on this task). Support for this task order effort is limited to those systems/activities currently maintained under this contract. This notice is provided to advise you of the fact that ABC Company is currently performing the work, which will be covered by an upcoming Millennia Lite RFQ.

Sincerely,

JOHN DOE  
Contracting Officer  
FTS Acquisition Services Division



## Millennia Lite Ordering Guidelines

### Sample 5

April 9, 1999

Notice To All Multiple Award Contractors Under RFP GS-O00-000

DEF Company, which is not a current Millennia Lite contractor, is currently providing data system and administrative support to the South Base, Telecom Division Office under a GSA Facilities Management Contract. DEF Company has been performing the work for the past three years and performance is considered good. The current skill level or skill level(s) for this contract is/are as follows: (optional: provide descriptions of skill levels, or any other background information necessary to provide all multiple awardees sufficient information to propose on this task). Support for this task order effort is limited to those systems/activities currently maintained under this contract. This notice is provided to advise you of the fact that DEF Company is currently performing the work, which will be covered by an upcoming Millennia Lite, Functional Area 3 RFQ.

Sincerely,

JOHN DOE  
Contracting Officer  
FTS Acquisition Services Division

## **Millennia Lite Ordering Guidelines**

### **APPENDIX I**

#### **Fair Consideration**

##### **Facts**

- The Federal Acquisition Streamlining Act (FASA), October 13, 1994, provides that “all contractors shall be provided a fair opportunity to be considered for each task or delivery order in excess of \$2,500..”
- The FASA mandate is repeated in the FAR as well as in the Office of Federal Procurement Policy’s (OFPP) “Best Practices Guide for Multiple Award Task and Delivery Order Contracting”. (<http://www.arnet.gov/Library/OFPP/PolicyDocs/>)
- In an April 21, 1998 memorandum to the President’s Management Council from OMB’s Acting Deputy Director for Management, concerns were expressed with “...the practice of allowing agencies to designate one of the contract holders as the preferred source for a specific order [lacking use of one of the sole source exceptions provided for in FAR Subpart 16.5].”
- In an April 21, 1998 memorandum, the Acting Administrator of OFPP requested that the FAR Council revise the FAR Subpart 16.5 coverage to “prohibit agencies from designating a preferred source just as it presently prohibits agencies from allocating orders”.
- Agencies are encouraged, throughout OFPP’s Best Practices Guide, and in FAR Subpart 16.5, to use streamlined and simplified procedures for issuing orders under multiple award contracts. The Guide indicates that “...the few requirements set forth in the Statute for placing orders...are designed to give agencies considerable leeway and minimal burden as long as all awardees are considered.”
- FAR Subpart 16.505(b) specifies that “...the contracting officer need not contact each of the multiple awardees under the contract before selecting an awardee if the contracting officer has information available to ensure that each awardee is provided a fair opportunity to be considered for each order.”

## Millennia Lite Ordering Guidelines

### Exceptions To Fair Opportunity

There are only four exceptions to the mandates to provide a fair opportunity for all contractors for each order<sup>1</sup>:

1. The agency has an unusual **urgency** for the service and providing an opportunity to all contractors would result in unacceptable delays;
2. only **one contractor is capable** of providing the service at the level of quality required because the service is unique or highly specialized;
3. in the interest of economy and efficiency, the order should be issued on a sole-source basis as a **logical follow-on** to a previous order that was issued competitively; and
4. it is necessary to place the order with a particular contractor in order to satisfy a **minimum guarantee**.

### Urgency

The agency need for services is of such urgency that providing such opportunity would result in unacceptable delays. Use of this exception requires a detailed explicit justification that includes reasons and rationale.

### Only One Contractor is Capable

Only one such awardee is capable of providing such services at the level of quality required because the services ordered are unique or highly specialized. Consideration may be given to this exception when the SOW is required to be written in a manner that would reveal proprietary information of a specific single awardee. Proprietary information could include a single awardee's technical or intellectual solution or a unique method of solving problems. Use of this exception requires a detailed, explicit justification as to why the services that are being requested are so unique that none of the other MILLENNIA LITE primes in the respective Functional Area are able to provide the requested service.

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<sup>1</sup> The FAR requires that the CO make a "determination" that one of the four exceptions applies. It will be necessary, therefore, for Government technical representative to provide the CO with a written explanation of how and why the exception applies. The CO will use this explanation to make the required "determination." The determination, as well as Government technical representative's written explanation will be included as part of the official task order file.

## **Millennia Lite Ordering Guidelines**

### **Logical Follow-on**

The order should be issued on a sole-source basis in the interest of economy and efficiency as a logical follow-on to a Task Order (TO) already issued under this contract (i.e., one of the MILLENNIA LITE contracts), provided that all multiple awardees were given fair opportunity to be considered for the original order. "Logical follow-on to a TO already issued under this contract" refers to TOs issued and for which, at least a significant subtask has been completed, i.e. the follow-on is the next phase of task. Appendix H provides sample letters that may be used to notify all awardees of a logical follow-on for an incumbent contractor. (Because determination of when something is truly a logical follow-on is usually subject to interpretation, we recommend that all contractors be notified of an intent to issue an order as a logical follow-on so any differences of opinion can be resolved immediately.)

The "follow-on exception" to fair opportunity permits agencies to award a follow-on task order on a sole-source basis provided all awardees are given an opportunity to compete for the original order. If the original order was issued on a non-competitive basis, however, the follow-on order must be competed. Program officials and customers should also avoid situations where the requirements for the competed original task order are insignificant in dollar value, only to be followed by sole-source task orders that are much broader in scope and dollar value. This practice may be construed as contrary to the fair opportunity process.

### **Minimum Guarantee**

The MILLENNIA LITE Contract provides each Contractor with a minimum guarantee of \$25,000 for the life of the contract. The minimum guarantee exception will be monitored and exercised by the MILLENNIA LITE PCO.

### **Alternative Procedures**

In consideration of the purpose of the MILLENNIA LITE contracts and of the mandates and guidance presented above, the following alternatives are considered to provide the required "fair consideration" and may be used for issuing task orders under the MILLENNIA LITE contracts.

#### **Alternative 1 - Request Written Proposal from All MILLENNIA LITE Contractors:**

- a) The Government technical representative prepares, and the CO forwards, an SOW and criteria for contractor selection to, and requests proposals from, all MILLENNIA LITE contractors in the selected Functional Area;
- b) The Government technical representative evaluates the proposals submitted against the criteria, documents the results of its evaluation, and recommends contractor selection to the CO; and
- c) Task Order is awarded to the contractor in accordance with the method of award described in the SOW.

## Millennia Lite Ordering Guidelines

### Alternative 2 - Oral Presentations by Contractors:<sup>1</sup>

- a) Government technical representative prepares and the CO forwards a statement of work and criteria for contractor selection to, and requests proposals from, all MILLENNIA LITE contractors in the selected Functional Area;
- b) Interested contractors make oral presentations;
- c) Government technical representative evaluates oral presentation against criteria, and documents evaluation;
- d) The Government technical representative evaluates the written proposals against the criteria, documents the results of its evaluation and recommends contractor selection to the CO; and
- e) Task Order is awarded to the contractor in accordance with the method of award described in the SOW.<sup>2</sup>

### Debriefs

It is required that the cognizant CO attend all presentations of oral proposals by the contractors.

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<sup>1</sup> For use with those tasks for which detailed statements of work are not possible and maximum contractor input is necessary to determine the work processes necessary, and those for which limited time is available for award.

<sup>2</sup> Price must be considered in every award decision under all alternatives and under the sole source (exception) process.

### APPENDIX J

#### Performance Based Statements of Work

The SOW is the heart of the order process and fundamentally begins with the selection of task type (i.e. time and materials or firm fixed price). The SOW is the single most important document for the acquisition as it directs the proposal preparation, is the basis for the evaluation criteria, and provides for the standard for inspection and acceptance or rejection of the contractor's work.

#### Performance Based SOWs

- List the tasks the contractor must accomplish – the “what” not the “how” – this is sometimes referred to as the “do-what” approach (i.e. compile atmospheric data, perform statistical analysis of data, author recommendation for application of data)
- Emphasize the outcomes not the procedures
- In the case of services, describe the kind of service, the duration, and the output
- Use verbs to describe tasks
- Describe deliverables in terms of what the deliverable is to do
- Establish standards for acceptance of each task on a measurable level
  1. Quantity
  2. Timeliness, responsiveness
  3. Accuracy rates
  4. Format
  5. Quality

#### **FAR 11.002 directs that requirements, to the maximum extent practicable, be stated in terms of**

- Functions to be performed
- Performance required
- Physical characteristics of deliverables

#### Generic format for SOW

- 1.0 Scope
  - 1.1 Background
  - 1.2 Objectives
- 2.0 Applicable Documents
- 3.0 Tasks (requirements)
- 4.0 Government furnished property
- 5.0 Government furnished facilities
- 6.0 Deliverable data
- 7.0 Evaluation criteria
- 8.0 Method for award

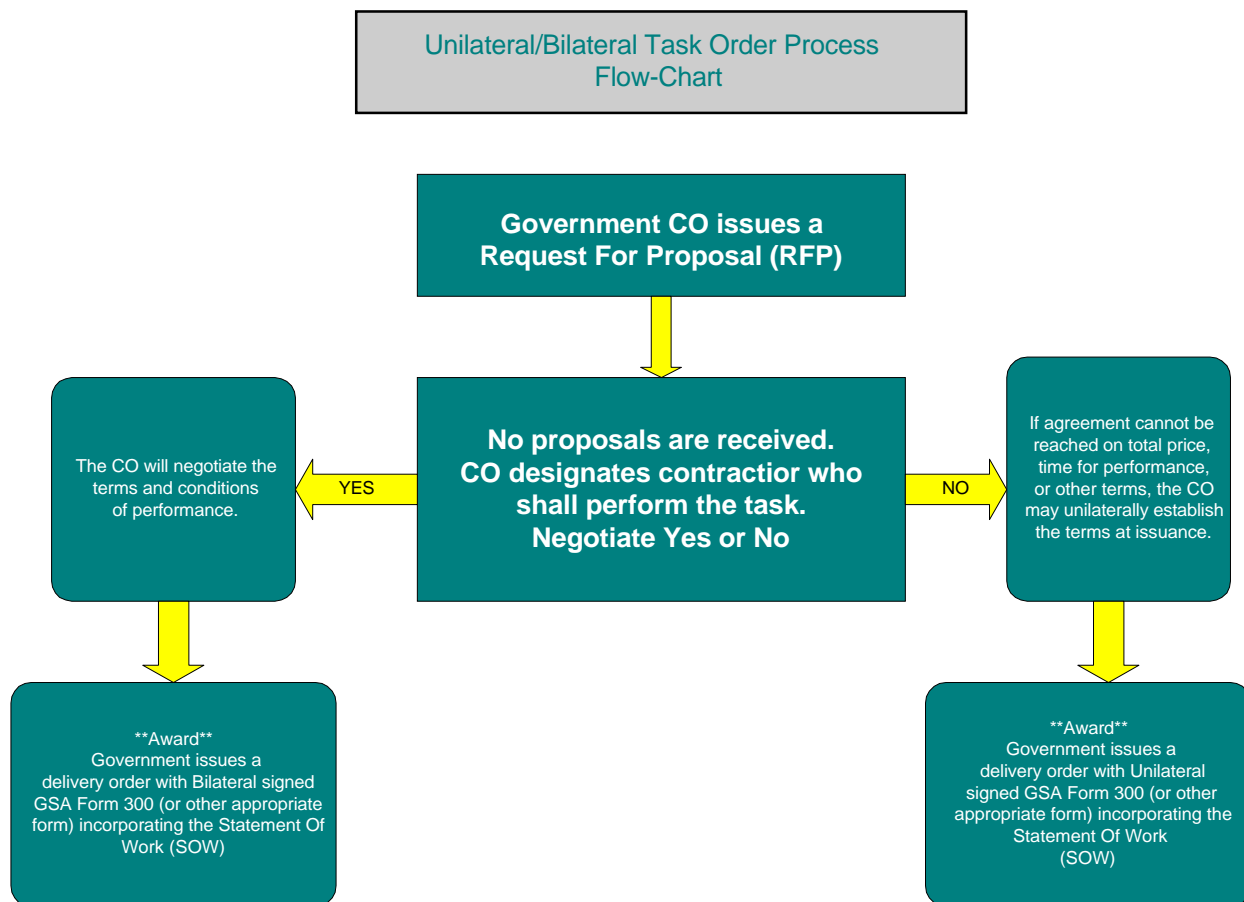
*NOTE: In order to be able to score each proposal in an objective manner, it is important that evaluation standards be defined relative to the evaluation criteria in advance of receipt of proposals*

## Millennia Lite Ordering Guidelines

### APPENDIX K

#### Process Flow Charts

Check against our RFP Task Order Process



### **APPENDIX L**

#### **Oral Presentations**

##### **Why Oral Presentations?**

Oral presentations are used to:

- reduce time and costs associated with the source selection process;
- reduce proposal preparation costs;
- allow all parties a more thorough understanding of the requirements;
- improve the exchange of information between the Government and the offerors;
- make customers feel more involved in contract selection and award; and
- improve the Governments ability to select most advantageous offer.

The use of oral presentations has the potential of significantly reducing the time and costs associated with the source selection process. Such benefits can be realized by both government and industry. Oral presentations avoid the trappings of lengthy written marketing pitches and essay writing contests. In addition, certain types of written proposal information, particularly in the technical and management areas, are costly to prepare and time consuming to evaluate. Many technical and management processes often may be better conveyed and understood when explained orally or demonstrated visually.

The use of oral presentation techniques also allows for greater "face-to-face" interaction between buyers (the Government requirements personnel) and sellers (the offerors) during the proposal evaluation and selection processes. Through an oral presentation, Government evaluators, focusing more on personal interaction between the proposed key personnel, often gain a view of the offeror's key personnel by witnessing how they present themselves, how they work together, and how they communicate technical information to Government personnel.

##### **Considerations**

When deciding whether or not to use oral presentations, good business judgment is required. Oral presentations, in some cases, can be more costly for industry than streamlined written proposals. Preparing a team to give the oral presentation can be expensive. Travel costs can be significant when the contractor is required to make an oral presentation to customers and contracting officials that are not located in the same general area as the contractor. In this situation, video teleconferencing may be the preferred approach.

##### **Planning and Scheduling**



## **Millennia Lite Ordering Guidelines**

Oral presentations are particularly useful in situations where the offeror's qualifications to perform the work or the offeror's understanding of the requirement are the prime evaluation criteria. RFPs for multiple-award task order contracts may be ideally suited to the oral presentation approach since the Government is literally buying capability to perform work that will be more specifically defined after contract award.

The requirement for oral presentations is called out in the SOW and scheduling is generally done via letter upon receipt of proposals. In the course of one day, a schedule can be constructed to address the following for one to two offerors; a contractor's oral technical presentation, scoring the presentation, asking follow-up questions and clarifying contractor concerns, providing a short period for the contractor to update its price or technical proposal, and discussion among evaluation team members to achieve a consensus score based on the contractor's revised proposal. The oral presentations normally begin within five working days after forwarding the SOW to the selected firms. The presentations generally last 20 minutes to an hour and are followed by a 15-minute question and answer period.

When videotaping oral presentations, the CO should ensure that the offeror's key contract participants (e.g. project manager, site manager, etc.) present the technical proposal, in lieu of actors. Be sure to allow sufficient time to make necessary logistical arrangements.

A selection panel, consisting of the CO, technical advisor(s) and possibly client agency representatives, evaluate the oral presentations of firms relative to the evaluation criteria set forth in the SOW. The criteria may include any or all of the following: the firm's understanding of the work requirements, technical approach to meeting the client's needs, knowledge of the subject matter area, key staff capabilities and other corporate resources, past performance, and relevant project experience (See Appendix F for additional evaluation criteria).

### **The Construct**

Once the determination has been made that the oral presentation technique is appropriate for the acquisition, suitable evaluation criteria must be drafted.

Since technical and management factors are generally the subject of oral presentations, the evaluation criteria in these areas must be selected with great care. They should reflect factors which help determine how well qualified the offeror is to perform all aspects of the work, how well the offeror understands the requirements, and precisely how the offeror will approach the accomplishment of the required tasks. In most situations, the oral presentation will be limited to, and directed to, those evaluation criteria. Appendix F provides a summary of the types of evaluation criteria used in actual SOWs for evaluating both the oral and written components of the offeror's proposal.

## **Millennia Lite Ordering Guidelines**

The instructions for oral presentation should be present in the SOW and include the following:

- Description of the topics that the offeror must address and the technical and management factors that must be covered;
- Statement concerning the total amount of time that will be available to make the presentation;
- Description of limitations on Government-offeror interaction during and, if possible, after the presentation;
- Statement whether the presentation will encompass price or cost and fee;
- Description and characteristics of the presentation site;
- Rules governing the use of presentation media;
- The anticipated number and types of positions of the Government attendees; and
- Description of the format and content of presentation documentation, and their delivery; and a statement whether the presentation will be recorded (e.g., videotaped).

### **The Basics**

#### **A. Selecting the Order of the Presenters**

A lottery is most often used to determine the sequence of presentations by offerors. The time between the first and the last presentation should be as short as possible to minimize any advantage to the later presenters. One office used the following language to advise offerors that a lottery would be used:

"The order in which offerors will make their presentations...will be determined by a drawing of lots by the CO after receipt of proposals. Once notified of their scheduled presentation date and time, offerors shall complete their presentations on the scheduled date and time. Requests to reschedule will not be entertained".

#### **B. The Facility**

Based on the surveyed solicitations, the oral presentations have been conducted at a facility selected and controlled by the buying agency. From a practical standpoint, this approach may be the most appropriate and convenient for both the Government and the offerors. However, nothing would preclude an oral presentation being given at an offeror's facility. While much can be said regarding the facility in which the presentations will be made, it can generally be reduced to the following: the facility should be comfortable, accessible, and available for preliminary set-up.

#### **C. Discussion of Ground Rules**

Prior to the presentation, a government representative should review the ground rules of the presentation session with the offeror. Additional matters for discussion include

## **Millennia Lite Ordering Guidelines**

any restrictions on Government-offeror communications, information disclosure rules, documentation requirements, and housekeeping items. Also, prior to the commencement of the presentation, the CO should remind the Government participants of their responsibilities during and following the presentation. They should be advised that an oral presentation is procurement sensitive and that they may not discuss, within or outside the agency, (except among themselves) anything that occurred or was said at a presentation.

### **D. Recording the Presentation**

There is no requirement in regulation or otherwise that prescribes that a record of the oral presentation be maintained. Evaluators are free to rely on information provided by the offeror during the oral presentation and their own notes. However, since a portion of the content of the presentation may be deemed to constitute part of the "offer," it may be advantageous to preserve the presentation for the record. Such recording also permits evaluators to revisit the presentation to verify information. In any event, if the presentation of one offeror is to be recorded, then the presentations of all of the other offerors should be similarly recorded. Several methods, such as videotape, audiotape, or verbatim written transcripts, are available.

### **E. Government Attendance**

As a general rule, all of the Government evaluators should be present at every presentation. The CO must attend and should chair every presentation.

### **F. Presenters**

Presentations by the offeror are to be made in person.

### **G. Time Limit**

Firm time limits for the presentation must be established in the RFP and, of course, each offeror must be allotted the same amount of time.

### **H. Clarification of Oral Presentation Points**

After completion of the oral presentation, the Government may request clarification of any points addressed which are unclear and may ask for elaboration by the offeror on any point which was not adequately supported. Any such interchange between the offeror and the Government will be for clarification only, and will not constitute discussions within the meaning of FAR 15.610. The time required for clarification will not be counted against the offeror's time limit."

### **I. Evaluation of Presentations**

There is no firm rule regarding the most appropriate time to evaluate the presentation. Some agencies have elected to perform the evaluation immediately upon conclusion of

## **Millennia Lite Ordering Guidelines**

each presentation. Other agencies have performed the evaluations of presentations after all of the presentations have been made. If the latter approach is chosen, it is recommended that the evaluators should caucus following each presentation to exchange reactions, summarize potential strengths and weaknesses, and verify perceptions and understandings.

### **J. Documentation**

The SOW should require that, as part of the presentation, the offeror will provide a listing of names and position titles of all presenters and copies of all slides and other briefing materials that will actually be used in the presentation. It is preferable that such materials be provided to the evaluation team prior to the presentation to permit the evaluators to familiarize themselves with the information. These items become part of the official record along with the audio or video tape recording or transcript.

## **Millennia Lite Ordering Guidelines**

### **Summary – Practical Guidelines on the use of Oral Presentations**

Presenters should not include overly detailed, technical information on slides. Attempting to put a written technical proposal on presentation slides makes it difficult for evaluators to read and follow:

- Ask for briefing materials in advance of the presentation so that it can be reviewed by the evaluators attending the presentation. This will improve the evaluator's ability to understand the presentation.
- The setting for the oral presentation should be comfortable and free from disturbance and interruption.
- The proposal preparation instructions should clearly state whether the information in the oral presentation will be used solely for evaluation purposes in selecting the contractor, or whether such information may constitute part of the offer.
- The Government should not accept any materials that were not actually part of the oral presentation.
- Where time limits or restrictions on the amount of presentation material will be used, such restrictions should be clearly identified in the solicitation.
- Allow sufficient time between presentations to permit the evaluation team to caucus and reach consensus.
- If practicable, score the oral presentations immediately after each presentation is made.
- Require the offeror's key personnel to make the oral presentation.
- Schedule the oral presentations as soon as practicable after receipt of proposals.
- Judiciously select evaluation criteria most important to the source selection and clearly identify the factors that apply to the oral presentation
- At the conclusion of the presentations, the selection panel should discuss the relative strengths and weaknesses of the firms and document its evaluation. Subsequently, after reviewing the panel's recommendations, the CO makes the final decision and awards the task order to the firm best suited for the project.

### **Conclusion**

"The benefits of oral proposals are legion. They will allow the contracting community to award the contracts in half the time or better than traditional methods, to reduce contractor bid and proposal costs by better than half, and to select better contractors

## **Millennia Lite Ordering Guidelines**

during the source selection process. 'We can choose better contractors because we will be better able to judge key personnel who will actually be working on the contract rather than proposal writers who will never be involved in contract performance. So this means an incredible amount to the procurement professionals on the front lines, to the program customers, and to the contracting community. Streamlining and better source selection--that's a real winner.' " (Quotation by Office of Federal Procurement Policy Administrator Steven Kelman)

## Millennia Lite Ordering Guidelines

### APPENDIX M

#### Debriefs

Below is a sample outline for the unsuccessful contractor XYZ, Inc. This outline is not meant to be all-inclusive but to provide a general format. Debriefs can be more or less elaborate depending on the complexities of the task order award.

#### Sample Debrief

Award for Project No. \_\_\_\_\_ was made to XYZ, Inc., on (date)\_\_\_\_\_.

#### Sequence of Events

An RFP, dated \_\_\_\_, was sent out to all MILLENNIA LITE Contractors with a due date of \_\_\_\_\_. A total of five offers were received. A Best Value Approach, where technical was more important than price, was used in the overall evaluation.

The following technical evaluation criteria were used: (1) Management /Staffing, (2) Technical Understanding and Approach, and (3) Past Performance.

Offeror	Ranking/Rating	Total price	Mgmt/Staff	Tech	Past Performan ce
White, Inc.	1 <sup>st</sup> /98.00	\$5,095,000	35	45	18
Contractor 2	2 <sup>nd</sup> /81.00	\$5,100,000	30	39	12
Contractor 3	3 <sup>rd</sup> /80.00	\$5,090,000	29	38	13
Contractor 4	4 <sup>th</sup> /78.00	\$5,095,000	28	38	12
XYZ, Inc.	3 <sup>rd</sup> / 75.00	\$6,500,000	33	34	8

**\*\*Note:** White, Inc. is the winning Contractor, Contractors 2, 3, 4 are the second, third, and fourth ranked offerors, and XYZ, Inc is the unsuccessful offeror requesting a debrief.

#### Strengths

The strength of XYZ, Inc. Management/Staffing was that it demonstrated specialized technical expertise in the areas of information systems, network management and telecommunications.

## **Millennia Lite Ordering Guidelines**

### **Weaknesses**

XYZ demonstrated only a surface knowledge of the Agency's requirement (specific information).

Past Performance was a weak area scoring only 8 out of a possible 20 points. Therefore, XYZ, Inc. may want to keep closer communication with clients prior to submitting them as a past performance reference.

### **Summary**

XYZ, Inc had the highest price proposal and the lowest technical score.



## Millennia Lite Ordering Guidelines

### APPENDIX N SAMPLE SCORING GRID

#### Program Evaluation – Tracking the Future Project

##### Mandatory Evaluation Criteria

To be considered responsive, proposals must meet all of the following mandatory evaluation criteria. Bids not meeting all of the mandatory requirements will be given no further consideration.

1. Offeror must have offices in each of the five regions of Canada to undertake focus group meetings.
2. Proposed Project Manager must have a minimum of five years of experience in conducting focus groups and in managing similar program evaluation projects.
3. Compliance with the Certification requirements.

##### Weighted Evaluation Criteria

##### Firm's Experience (Maximum 20 Points – Minimum 14 Points)

	0-8 Points	9-11 Points	11-15 Points
Experience completing Similar projects on a National scale including proven performance 15 Points	limited directly related projects or no references	some similar projects on a national scale and demonstrated success (references checked)	numerous similar projects on a national scale with proven success (references checked)
	0 Points	1-2 Points	3 Points
Extensive experience in program evaluation and performance measurement – 3 Points	limited demonstrated experience	extensive experience in one area and adequate in the order	exceptional experience in both evaluation & performance measurement
	0 Points	1 Point	2 Point
National network of offices 2 Points	not demonstrated	all regions covered	all regions covered plus sub offices

## Millennia Lite Ordering Guidelines

### APPENDIX O

#### METHOD OF AWARD

**Note:** The following examples are versions of evaluation methodology. These versions are intended as “examples” of approaches, which may be used. Remember that the process is intended to provide flexibility. It is important to remember that the examples are not rigid standards.

##### Technically Acceptable/Lowest Cost

**Example:** The Government will make award to the responsible offeror submitting the lowest-priced technically acceptable proposal. The Government will first review unpriced technical proposals to determine which are acceptable, or, after discussions, could be made acceptable. The Government will then review the price proposals of offerors that have submitted technically acceptable proposals and award to the lowest total cost, technically-acceptable proposal.

##### Explicit Weighting Method

**Example:** The Government will make award to the responsible offeror whose offer conforms to the solicitation and receives the highest total score. Technical factors will be given a combined weight of X% (or X points) and total cost will be given a weight of X% ( or X points).

##### Greatest Value

**Example #1:** The Government will make award to the responsible offeror whose offer conforms to the SOW and is most advantageous to the Government, total cost, and technical factors listed below considered. For this SOW, technical quality is more important than total cost. As proposals become more equal in their technical merit, the total cost becomes more important.

The technical evaluation factors are listed in descending order of importance, and any subfactors associated with a technical evaluation factor are essentially equal.

1. Past Experience
2. Functional Understanding
3. System Management

Technical factor number 1 will be evaluated initially on a go, no-go basis. To be considered further in the evaluation process, an offeror must demonstrate that it has successfully completed at least one similar project within the past three (3) years. Offerors that do not meet the minimum requirement will not be considered for award. Offerors that meet the minimum requirement will be further evaluated for technical merit.

## Millennia Lite Ordering Guidelines

**Example #2:** The Government will make award to the responsible offeror whose offer conforms to the SOW and is most advantageous to the Government, total cost, and technical factors listed below considered. For this solicitation, technical quality and total cost are equally important. When technical proposals are evaluated as essentially equal, essentially equal, technical quality may be the deciding factor.

The technical evaluation factors listed below are of equal importance:

1. Implementation Techniques
2. Program Management
3. System Design
4. Past Experience

**Example #3:** The Government will make award to the responsible offeror whose offer conforms to the solicitation and is most advantageous to the Government, total cost, and technical factors listed below considered.

Proposals will be evaluated based on the following technical evaluation factors which are listed in descending order of importance:

1. System Design
2. Program Management
3. Past Experience
4. Qualification of Key Personnel

Total cost is less important than the combined value of the technical factors listed above.

**Example #4:** The evaluation factors and subfactors for this SOW reflect areas of concern against which judgments will be required to establish value for the technical, management, and total cost merits of an offeror's proposal. The factors to be evaluated are technical, management, and total cost. The basis for award is selection of a single, responsible source who satisfies all the SOW requirements and provides the most advantageous alternative for the Government, total cost, and other factors considered.

The proposals will be evaluated on the total cost factor and technical and management factors and subfactors. The following terminology is used to define the value of the factors and subfactors.

1. Significantly more Important: The factor or subfactor is two times or greater in value than another factor or subfactor.
2. The factor or subfactor is greater in value than another factor or subfactor but less than two times greater.
3. Equal: The factors and subfactors are the same value.

## Millennia Lite Ordering Guidelines

The technical and cost factors individually are significantly more important than the management factor. In respect to the total cost, the technical factor is considered more important.

### **Example #5:**

#### 6.0 Method of Award

The Government anticipates awarding a task order to the offeror whose proposal is the most advantageous to the Government, price and other factors considered. Technical proposals will be evaluated based on the factors described in Section 6.2. Technical merit is more important than price. Award may be made to other than the lowest priced technically acceptable proposal.

#### 6.1 Price Proposal Evaluation

Offerors' price proposals will be evaluated to determine price realism and reasonableness. Prices which are excessively high or low may be considered unrealistic and unreasonable, and may receive no further consideration.

#### 6.2 Technical Evaluation Criteria

The Government will evaluate technical proposals based on the following factors and weights. The order of importance and weighting should be determined independently for each task order, depending upon the unique requirements of the project.

	<u>Weight</u>	
Key Personnel		<u>100</u>
Project Manager	<u>50</u>	
Senior Subject Expert	<u>30</u>	
Communications Manager		<u>20</u>

Assumptions, Conditions, and Exceptions and overall staffing plan will be reviewed for acceptability, realism, reasonableness, and potential impact on other information provided in the task order proposal.

##### 6.2.1 Key Personnel

As a MINIMUM, each proposed key personnel will be evaluated based on whether they have the skill deemed by the Government to be necessary to minimize risk and successfully complete the requirements in SOW. In addition, the key personnel will be evaluated on the basis of estimated hours. Further, any assumptions, conditions, and exceptions and the overall staffing plan will be examined and considered regarding any impact on the offeror's capability to perform the effort required by this task order.

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### **Example #6:**

#### 6.0 Method of Award

The Government anticipates awarding a task order to the offeror whose proposal is the most advantageous to the Government, price and other factors considered. Technical proposals will be evaluated based on the factors described in Section 6.2. Technical merit is more important than price. Award may be made other than the lowest priced technically acceptable proposal.

#### 6.1 Price Proposal Evaluation

Offerors' price proposals will be evaluated to determine price realism and reasonableness. Prices which are excessively high or low may be considered unrealistic and unreasonable, and may receive no further consideration.

#### 6.2 Technical Evaluation Criteria

The order of importance and weighting should be determined independently for each task order, depending upon the unique requirements of the project.

The Government will evaluate technical proposals based on the following factors in descending order of importance. The Key Personnel Experience is twice as important as the Project Plan/Technical Approach and four times as important as the Technical Presentation.

1. Key Personnel Experience
2. Project Plan/Technical Approach
3. Technical Presentation

Assumptions, Conditions, and Exceptions will be reviewed for acceptability and potential impact on information provided in the task order proposal.

##### 6.2.1 Key Personnel Experience

As a MINIMUM, and as they relate to Section 6.2, each proposed key personnel will be evaluated based on whether they have the skill deemed by the Government to be necessary to minimize risk and successfully complete the requirements in the SOW.

##### 6.2.2 Project Plan/Technical Approach

As a MINIMUM, offerors shall present the Project Plan (see Example 2). The Project Plan will be evaluated on the basis of the project schedule, including delivery dates and milestones, as well as on start and completion dates by task.

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Any applicable phase-in or phase-out of project staff will be evaluated for potential effect on the success of the project.

Offeror's shall present the technical methodology they would use in performing this project as specified in Section 3, demonstrated by the technical presentation. The technical approach will be evaluated on its feasibility, practicability, and appropriateness in accomplishing the tasks and deliverables identified in Section 3.0.

### **6.2.3 Oral Presentation**

As a MINIMUM, the offeror's presentation will be evaluated on the quality of the narrative presentation, oral communication skills and effectiveness of presentation media.